



Masonic Charity Foundation - 2019 Strategic Plan



CONTENTS

- Background2
 - Mission, Vision, Values2

- Goals for the Future.....4
 - A Great Place to Work5
 - A Great Place to Live.....6
 - Resource Stewardship7
 - Mission Enhancement & Growth8

- The Path Forward9

Masonic Charity Foundation

The Masonic Home, today known as the Masonic Village at Burlington (Masonic Village), was founded in 1898 to care for orphans and aging Masons from throughout New Jersey. Masonic Charity Foundation of New Jersey (Foundation), a nonprofit organization, was incorporated in 1930 for the purposes, among others, of providing housing, services and related facilities for older adults. Services have expanded since its inception in the late 1800s to include care for both Masons and their families as well as individuals living in the greater community, regardless of their affiliation. The Foundation is the governing body of the Masonic Village and Acacia Hospice and ensures dedication to mission, preservation of the vision of the founding fathers and the operational and financial integrity of the organization.

The Strategic Planning Process

Beginning in the summer of 2018, the strategic planning committee of the Masonic Charity Foundation board as well as members of the Masonic Village executive leadership initiated a strategic planning process. The overall goal of the planning process was to establish a clear direction as to the strategic priorities for the organization over the next several years. Additionally, the organization's mission, vision and core values were affirmed and in some cases, newly developed as part of the process. The strategic planning process consisted of a combination of board education on trends and external forces shaping the sector, in-person meetings with heavy facilitated discussion, and surveys of various stakeholder groups. Ziegler staff assisted in the process with project management, research support and consulting assistance.

Mission, Vision & Values

Masonic Charity Foundation has had a mission statement in place for a number of years, but prior to this process, there was no formal vision statement or set of adopted core values. The strategic planning committee affirmed the following mission statement and adopted the vision statement and core values of the organization.

Mission Statement: The Masonic Charity Foundation of New Jersey delivers personalized services and compassionate care, inspired by the spirit, ideals and values of Freemasonry, to promote the highest quality of life for Freemasons, families, and others in the community.

Vision Statement: Masonic Charity Foundation will continue to be an adaptable, innovative, and sustainable organization that enhances its ability to live and grow its mission.

Core Values:

- **COMPASSION-** We demonstrate care, trust and respect in all that we do.
- **EXCELLENCE-** We commit to high-quality services that exceed stakeholder expectations.
- **STEWARDSHIP-** We are responsible and thoughtful with the resources bestowed upon us.
- **COMMUNITY-** We foster and support community with one another and the sharing of common values, interests and goals.

The mission, vision and values statements are intended to be known to all stakeholder groups within and outside of the organization. The statements detail what the organization is, what it strives to be and the culture it embodies in all endeavors. These sentiments are a key component of the brand of Masonic Charity Foundation and play a role in the execution of operational oversight of Masonic Village.

Strategic Goals

The planning committee set forth to identify key priority areas for the organization across the next 3 to 5 years. These goals outline the big-picture, strategic areas of focus for the organization. A total of four strategic goals were adopted and are outlined below, in no particular order of importance.

A Great Place to Work

A Great Place to Live

Resource Stewardship

Mission Enhancement & Growth

These strategic goals are further outlined below.

A Great Place to Work

Masonic Charity Foundation of New Jersey is all about service to others. We place particular emphasis on ensuring a stable, engaged workforce that embodies our mission, vision and values. We value developing leaders at all levels within the organization and strive to advance personal and professional development opportunities.

As the Foundation focuses on this particular goal across the next several years, the following elements are important considerations when developing implementation plans and evaluating progress towards achieving our goal of being a Great Place to Work.

- Professional development considerations should be a consistent element of employee review processes, training opportunities and succession planning exercises.
- Stability and a low turnover rate will be key aspects of this goal.
- A competitive salary and benefits package with pre-established benchmarks (e.g., compensation at a certain quartile compared to the industry norm) is something that will be evaluated on a regular basis.
- An engaged staff that has meaningful relationships with one another, with those being served and with family members, will be important to ensure a happy workforce.
- Staff must meet the quality expectations set forth by leadership and deliver service consistent with the core values of the organization. In turn, the organization is responsible for offering high-quality training and putting in place strong managers and leaders to support quality goals.
- All staff, regardless of their position, are important to the organization.
- All staff will treat others according to the basic principles of the Masonic fraternity.

A Great Place to LIVE

Masonic Charity Foundation of New Jersey is all about service to others. We place particular emphasis on being a recognized leader in senior services and demonstrating our value to those we serve as well as our external partners.

As the Foundation focuses on this particular goal across the next several years, the following elements are important considerations when developing implementation plans and evaluating progress towards achieving our goal of being a Great Place to Live.

- Ensure a safe, vibrant and wonderful living environment.
- Be a leader and not a follower for standards of excellence. Masonic Charity Foundation should strive to be the one setting the standards for others to follow.
- Strive for recognition and acknowledgement of our high quality by external agencies and other external bodies (accrediting bodies, star ratings, state surveys, awards from others).
- Build upon the strong history of high-quality care and services.
- Continue to stay relevant and differentiate ourselves from others.
- Enhance offerings and stay on top of changing consumer expectations.
- Commit to ongoing investments in offerings to ensure the organization does not become stale.
- Strike an appropriate balance of focusing on maintaining what the organization already has with moving forward with other initiatives that will ensure Masonic Village is a great place to live.

Resource Stewardship

Masonic Charity Foundation of New Jersey acknowledges the generous support of its donors and tremendous vision of its founders. We embrace the role as financial stewards and commit to deploying resources in a manner consistent with the mission, vision and values of the organization.

As Masonic Charity Foundation focuses on this particular goal across the next several years, the following elements are important considerations when developing implementation plans and evaluating progress towards achieving our goal of being responsible stewards of the resources bestowed upon us.

- Ensure competitive price points for the value of services provided.
- Identify operational efficiencies that can enhance cost containment measures.
- Identify revenue diversification and enhancement opportunities.
- Consistently monitor and improve upon key financial and operational metrics such as occupancy rates, investment performance, net income, revenue, etc.
- Acknowledge that financial solvency will be critical to sustain the organization.
- Ensure that there is a disciplined plan for maintaining and reinvesting in existing infrastructure that is supported by sound capital planning.
- Continue to support the organization's ongoing commitment to charity care with a strong development platform for fundraising and gift-planning to support the charity-care commitment.
- Acknowledge the importance of leveraging assets in a manner that supports both the existing mission and long-term sustainability.
- Continue to expand and strengthen the relationships with New Jersey Masons to broaden statewide support for the mission of Masonic Charity Foundation.

Mission Enhancement & Growth

Masonic Charity Foundation of New Jersey recognizes the value of the services it offers and the lives it touches and seeks to expand and enhance its mission. The mission enhancement and growth initiatives will build upon the deep history of the organization, respect the meaningful work currently being done and take advantage of opportunities for positive change in the future.

As Masonic Charity Foundation focuses on this particular goal across the next several years, the following elements are important considerations when developing implementation plans and evaluating progress towards achieving our goal of growing and evolving the mission of the organization.

- The Foundation will need to effectively balance the care needs and interests of fellow Masons with the needs and interests of others being served outside of the Masonic brotherhood.
- Messaging and branding, particularly in relation to expansion and growth initiatives, should reflect the respected values and history of the brotherhood without suggesting exclusion of others outside of the affinity group.
- Any growth initiatives should not compromise existing operations and service lines. Masonic Charity Foundation will continue to enhance existing offerings at Masonic Village while also exploring strategic growth opportunities.
- Growth may come in the form of partnerships with others, particularly in geographic areas in other parts of New Jersey. This may also be in the form of new or alternative service lines than what currently exist (e.g., hospice or other home and community-based services).
- Growth strategies need to always align with the mission of Masonic Charity Foundation.

Next Steps

The leadership team will be charged with developing an implementation plan to carry forward the four strategic goals outlined in this document. Within that document, details such as specific action steps, timelines and success measures will be further outlined. As part of the development for the implementation plan, it will be important for the leadership team to establish modes of communicating updates to the board. This may be in the form of updates at board meetings, dashboards indicating performance on success measures and so forth. The over-riding principle will be to develop a disciplined communication plan to ensure that the goals set forth in this document are being advanced.

Annual Review

It is also suggested that the board and leadership designate time annually to conduct a check-in on the strategic plan. There are instances where priorities change or external events prompt reconsideration of a specific goal. While it may not be necessary to do a full deep-dive assessment of the report, it will be important to view the strategic plan as a living, functional document that can be changed and updated as needed. If specific items are no longer relevant, they serve little purpose on a current strategic plan.