

Building Tomorrow Together



**STRATEGIC
PLAN** 2025-2028



PRESIDENT'S MESSAGE

What we do with the next four years matters. Our history and standard of excellence position us to drive the future of affordable housing in St. Mary's County and beyond.

The *Building Tomorrow Together* Strategic Plan sets forth next steps for Cedar Lane Senior Living Community, as we strive to be a thought leader and growth catalyst in our industry. With four primary goals, this strategic plan is a living framework that provides direction for organizational growth, while allowing for flexibility moving forward.

What is not flexible is our determination to provide more seniors with the service-rich, affordable retirement community they deserve.



Eric Golden
President/CEO



OUR VISION

Cedar Lane is the region's affordable senior living community of choice, providing a quality residential environment that evolves along with the diverse population it serves.

OUR MISSION

Cedar Lane Senior Living Community is a collaboration of 501(c)(3) non-profit organizations serving seniors and disabled adults in Leonardtown, Maryland since 1977. Our mission is to help residents live with maximum dignity, independence and quality of life by:

01. setting and maintaining standards of excellence in affordable housing
02. facilitating access to quality, resident-driven services
03. delivering exceptional customer service
04. attracting and retaining qualified and compassionate employees
05. sustaining and advancing our work by engaging supporters through strategic outreach and fundraising
06. continually evaluating and improving our facilities, technology and partnerships to remain responsive to the needs of the community



GOAL 1: *EXPAND* THE MISSION THROUGH STRATEGIC GROWTH

Long term objectives/priorities:

Cedar Lane will proactively pursue new development opportunities and property acquisitions to increase the number of senior residents served.

Specific Goals:

Develop a new apartment complex, Cedar Lane Phase IV, adjacent to Cedar Lane's current campus by 2028.

Remain open to potential opportunities for acquisition of other affordable housing communities to further expand the Cedar Lane portfolio.

CEDAR LANE SENIOR LIVING COMMUNITY

PHASE IV DEVELOPMENT

Here is a look at the numbers behind the strategic decision to expand Cedar Lane's impact, reach, and sustainability through the addition of a new apartment complex

ABOUT THE DEVELOPMENT



SQUARE FEET
60,000



FLOORS
4



TOTAL UNITS
70



RESIDENTS
100-140



TOTAL COST
\$21 MILLION

GROWTH

Leonardtown's population has grown approximately 55.7% over the past ten years.



55.7%

*MD Dept. of Planning Data Center

MEETING A CRITICAL HOUSING NEED



In Leonardtown's *Sustainable Communities Action Plan*, one of the municipality's main objectives is to work with development partners to address **the need for affordable housing, specifically for those 55 or older.**

236

SENIOR AND DISABLED APPLICANTS WAITING FOR AN APARTMENT AT CEDAR LANE



302 JOBS PROJECTED

Affordable housing development plays a crucial role in job creation, benefiting both the construction industry and the broader local economy due to consumer spending after the units are occupied.

*Rental Housing Works: RAM FTE Calculator.



"Growth is never by mere chance; it is the result of forces working together,"

— James Cash Penney
Founder, J.C. Penney stores

Goal 1 Tactical Plan:

06

Provide Board of Directors with a short list of vetted development partner options.

Enter into a partnership agreement that protects Cedar Lane's interests, insulates its current assets, and allows management to gain development expertise.

Complete the site approval process.

Actively search for funding opportunities through grants, loans or partnerships via private, municipal, state and federal sources.

Invest in training for key staff to earn certifications in alternate subsidy models including the Low Income Housing Tax Credit program (LIHTC).



Goal 1 Anticipated Outcomes:

Achieve development capacity that positions the organization to expand its mission through new construction and/or potential acquisitions.

Partner with external stakeholders to leverage capital funding sources.

Successfully secure capital bond funding as a primary source of financing, mixed with subordinate soft sources.

New apartment complex available for occupancy by the first quarter of 2028.



Focus

Long term objectives/priorities:

Evaluate the way Cedar Lane recruits, hires, grows and retains its workforce talent.

Enhance employee engagement and culture, focusing on employee rewards and recognition, training and development.

Track and act on data driven feedback for improvement.

GOAL 2: *FOCUS* ON HUMAN CAPITAL

Specific Goals:

Invest in a staff performance management initiative.

Develop a talent pipeline and cross training opportunities for high-performing staff members who are interested in growing their careers and taking on more responsibility within the organization.

Develop a succession plan for key positions and roles across the organization.

Solicit feedback from staff members to determine the types of rewards/recognition they find meaningful.



STAFF PERFORMANCE MANAGEMENT INITIATIVE

UNDERSTANDING THE VALUE OF THE INVESTMENT

1

PROGRAM COST:

\$25,000



3



\$12,500

Average cost to onboard
one new staff member

2

WHAT'S INCLUDED:

- Job analyses, revised job descriptions, matching performance appraisals
- Labor grade determinations, regional wage survey and progression schedules
- Development of new job evaluation program
- Supervisory training



10

Average number of new
hires each year

4

5

Cedar Lane will
recoup program costs
by retaining just
TWO staff members

Goal 2 Tactical Plan:

Conduct a SWOT analysis of recruitment and retention at Cedar Lane.

Implement the staff performance management initiative by spring of 2025. Complete initial training and annual training thereafter.

By late 2026, create an employee remuneration statement outlining total value of company benefits to help employees recognize their true compensation.

Prepare for leadership transitions by developing a succession plan, including the identification of executive search solutions.

Explore ways to introduce a cross-training program within the organization.



"Everyone talks about building a relationship with your customer. I think you build one with your employees first."

- Angela Ahrendts, Senior Vice President, Apple

Goal 2 Anticipated Outcomes:



Job satisfaction improved.



Reduced employee turnover rate.



Average time for recruitment reduced.



GOAL 3: *MODERNIZE* THE ORGANIZATION AND FACILITY

Long term objectives/priorities:

Specific Goals:

Advance the organization's operations and processes in service of tangible mission outcomes.

Establish relationships with local efficiency experts to take advantage of energy and cost-saving opportunities.

Ensure that the organization is aligned with state energy efficiency initiatives by 2028.

Align the organization's structure, capabilities, resources, policies and management systems with Cedar Lane's evolving purpose and direction, to remain competitive in the affordable housing market.

Increase the facility's sustainability and energy efficiency while improving environmental comfort.

Reduce unanticipated maintenance expenses by gaining a better understanding of the status and projected lifespan of Cedar Lane's mechanical, electrical and plumbing systems. Proactively budget for significant upgrades based on data findings.

Goal 3 Tactical Plan:

Complete value engineered modifications and aesthetic upgrades to the Church and Colton-Weinberg Buildings.

Conduct a capital needs assessment for the Colton-Weinberg Building.

Contract with a qualified energy solutions firm to perform a campus-wide efficiency audit, and present the findings report to the Board of Directors to vote on proceeding with any or all suggested initiatives.

Utilize SMECO's EmPower Maryland Program to assess the facilities and identify energy and cost-saving measures. Facilities director to determine frequency necessary for ongoing facility energy-use audits.

Maintenance staff members to attend SMECO training to learn how to identify energy efficiency opportunities throughout the facility.

Upgrade old appliances with Energy Star rated appliances through attrition.



Goal 3 Anticipated Outcomes:

Completion of BI and BIII renovations – delivering the changes residents have been asking for.

Completion of all scheduled energy audits.

Implementation of one or more green initiatives resulting in measurable improvements in efficiency.

Enhanced perceived comfort by residents, visitors and staff.

Receipt of financial incentives for energy efficiency upgrades.



GOAL 4: DRIVE STAKEHOLDER *ENGAGEMENT*

Long term objectives/priorities:

Listen to, collaborate with, and inform key stakeholder groups to foster connections, trust, confidence and buy-in for Cedar Lane’s key initiatives.

Identify and mitigate potential risks and conflicts with stakeholder groups, including uncertainty, dissatisfaction, misalignment, disengagement, and resistance to change.



Goal 4 Specific Goals:

Residents:

Continue to measure and evolve Cedar Lane’s culture of customer service. Foster a cooperative relationship with the tenant population in all management activities, instilling pride, trust and a true sense of community values.

Peer Organizations:

Grow relationships with peer organizations including Three Oaks Center, Department of Aging & Human Services and St. Mary’s Nursing Center to create collaborations that benefit residents.

Community Stakeholders:

Expand advocacy and outreach to St. Mary’s County Commissioners, Department of Economic Development, Chamber of Commerce, Rotary Clubs, and other business leaders.

Board of Directors: Maintain a strong, diverse and engaged Board of Directors. Identify, approach and recruit influential community leaders who are invested in senior housing initiatives and have a deep network of contacts in Southern Maryland.





Goal 4 Tactical Plan:

Residents: Restructure feedback sessions to better clarify the purpose of the sessions and increase actionable insights. Explore “President’s Table” invitations for residents least likely to attend community forums. Investigate QR codes, live streams and other technologies to increase participation in Annual Meeting vote.

Peer organizations: Nurture relationships with area service organizations and foster a culture of collaboration, coordination and cooperation in order to better serve seniors and disabled adults.

Community Stakeholders: Engage with the community to become more aware of social, environmental, and economic factors at play so that Cedar Lane can contribute in a positive way.

Board of Directors: Create an effective recruitment campaign with compelling print materials. Consider conducting board member retreats for new idea generation and group bonding.

Goal 4 Anticipated Outcomes:

Residents:

A notable increase in resident satisfaction, pride in where they live, and desire to become an active participant in community happenings.

Peer organizations:

The creation of successful partnerships and programs to improve access to suitable affordable housing, foster better community health and quality of life for those of lesser means.

Community Stakeholders:

Give area leaders a better understanding of today's Cedar Lane, its dedication to St. Mary's County, and its role in the greater community. Inspire stakeholders to use their influence to support Cedar Lane's mission in meaningful ways.

Board of Directors:

A forward-thinking and collaborative team that strives to put its vast and varied expertise to use to benefit the residents of Cedar Lane.



SUMMARY

Our ambitions are bold because our residents deserve nothing less.

Our responsibilities are great because our community requires us to be the very best we can be.

Our future is bright because we have a groundswell of support and 48 years of experience to guide the way.

Our next steps are clear as we begin *Building Tomorrow Together*.



JOIN US

- Serve on Cedar Lane's Board of Directors
- Join the Friends of Cedar Lane fundraising board
- Volunteer for a community project or help out with an activity
- Make a donation to benefit our residents
- Support the residents of Cedar Lane in perpetuity with a gift to our Legacy Endowment Fund

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