

## Overview

Embark on the Community Excellence Program's Visionary Planning Phase, a groundbreaking 10-step initiative tailored to revolutionize retirement communities across Ontario. This initial phase sets the stage for a complete transformation, focusing on an in-depth understanding, comprehensive planning, and meticulous detailing. Here, we lay the groundwork, transforming spaces into vibrant havens of comfort, elegance, and functionality, preparing each community for a sustainable future of excellence.

### OBJECTIVE

The Visionary Planning Phase aims to develop a detailed, strategic blueprint for transforming each retirement community. This phase concentrates on thoroughly understanding each community's unique characteristics and needs, ensuring all proposed enhancements are thoughtful and perfectly tailored. The goal is to establish a solid, well-informed foundation to guide future improvements, setting the scene for the ongoing evolution in the Sustained Excellence Journey.

### PROCESS

The Visionary Planning Phase begins with Project Research and Onboarding, delving into each property's unique story and potential. This is followed by a Comprehensive Site Capture, documenting every detail of the existing space. Advanced 3D Tours and Space Analysis digitally bring the space to life, allowing for detailed examination and planning. Precision Floor Plans ensure every proposed addition fits perfectly into the intended space. The CHI Design Expert Report provides a neutral, respectful assessment of the current state, leading to a Customized Design Proposal that proposes a tailored refresh. A Strategic Roadmap is meticulously developed, culminating in a Client Presentation and Feedback Session. Subsequent Revisions and Final Documentation ensure a comprehensive, actionable plan for the community's transformation.

### BENEFITS

The Visionary Planning Phase offers profound benefits. It is the essential first step toward an elevated living standard within retirement communities, providing a clear, detailed, and tailored plan that keeps all parties informed and engaged. It lays a robust foundation for smooth and efficient implementation, ensuring every decision is informed by a deep understanding of the space and its inhabitants. Most importantly, it prepares the community for a transformation that promises a future where residents continually enjoy a vibrant, comfortable, and elegant living environment built on a program of ongoing enhancement and excellence.



# 1 **Project Research and Onboarding**

## **OBJECTIVE**

The Project Research and Onboarding phase is designed to lay a solid foundation for the Community Excellence Program by thoroughly understanding each retirement home's unique environment, history, style, and target market. This phase is crucial for tailoring the Community Excellence Program to meet and exceed each community's specific needs and expectations.

## **PROCESS**

### **Initial Research**

Our design team conducts extensive research on each property to help us appreciate your property's unique character and needs, ensuring our design proposals resonate with the residents and the broader community ethos. This involves studying the community's history, architectural style, resident demographics, and previous design work.

### **Stakeholder Interviews**

We conduct in-depth intake interviews with key stakeholders, including management, staff, and, when appropriate, residents. These sessions allow ample time to gather various insights and preferences. This step is vital for understanding the day-to-day operations, the community's specific challenges, and stakeholders' aspirations for the space.

## **DELIVERABLES**

- A comprehensive report summarizing the property's history, current status, and potential for enhancement.
- A detailed record of stakeholder interviews reflecting the community's voice and expectations.

## **BENEFITS**

Project Research and Onboarding confirm the design refresh aligns with the community's heritage and aspirations, building a strong foundation for subsequent phases and ensuring that every decision is informed by a thorough understanding of your property and its residents.



# 2 Comprehensive Site Capture

## OBJECTIVE

The Comprehensive Site Capture is a crucial phase where we physically assess and document every aspect of your retirement community. This in-depth analysis is the bedrock upon which we build a tailored and impactful design strategy, ensuring that every recommendation we make is informed by a deep understanding of the space and its potential.

## PROCESS

### Travel and On-site Analysis

Our team allocates time for travel, ensuring they arrive at your location ready to immerse themselves in the environment of each home. Once on-site, our experts spend hours capturing every detail of the retirement home. This includes the physical space and the atmosphere, flow, and subtle nuances that make each property unique.

### Detailed Scanning

We employ state-of-the-art technology to conduct a complete capture and detailed scan of the retirement home. This isn't just a visual overview; it's an in-depth capture of the space to understand its current state fully.

## DELIVERABLES

- A comprehensive visual and data capture of your entire property, including high-resolution images and detailed scans.

## BENEFITS

The Comprehensive Site Capture provides a detailed baseline of the property's current state, which is essential for accurate planning and design. It also allows for a more tailored approach to design, as the detailed capture highlights well-maintained areas and those needing attention, ensuring that resources are allocated effectively.



# 3

## 3D Tours and Space Analysis

### OBJECTIVE

The 3D Tours and Space Analysis phase transforms the detailed scans and images captured from your property into an interactive and immersive 3D digital tour. This virtual representation is crucial for understanding the retirement community's current spatial dynamics and potential enhancements, providing a foundational tool for informed planning and decision-making.

### PROCESS

#### Alignment and Preparation

This process is crucial for ensuring the virtual tour accurately reflects the physical space and provides users with a seamless and realistic experience. Our team dedicates hours to capturing, aligning and processing on-site data. This involves meticulously converting the detailed scans and images into a structured, navigable 3D tour.

### 3D Tour Creation

Using advanced 3D imaging technology and the data from the comprehensive site capture, we create an immersive 3D tour of all essential areas. The tour provides a realistic and comprehensive view of your property, amenity spaces, common areas, model and respite suites, allowing for virtual walkthroughs and an in-depth examination of the space.

### DELIVERABLES

- An interactive 3D virtual tour of your retirement community, accessible for virtual walkthroughs of all essential areas.
- Tags and links within the 3D tour to identify and reference specific areas or items of interest, facilitating a more informative and interactive experience.

### BENEFITS

The 3D Tours and Space Analysis step lets stakeholders virtually navigate and experience the property, enhancing understanding and engagement with the space. It also serves as a valuable tool for visualizing potential changes and improvements, supporting more effective and collaborative decision-making.



# 4 Precision Floor Plans

## OBJECTIVE

The Precision Floor Plans phase is dedicated to creating accurate and detailed representations of your retirement community's layout. These plans ensure informed and effective design decisions, helping visualize how new furnishings and décor will fit into the existing space.

## PROCESS

### Branding, Organizing, and Prepping

Our team meticulously organizes and prepares the floor plans. This involves branding the documents for easy identification and ensuring all plans are neatly organized for efficient use.

This step is crucial for maintaining clarity and coherence in all design-related documents and discussions.

### Representation of Existing Layouts

Additional time is dedicated to adding detailed representations of existing layouts, furniture, fixtures, and other critical elements to the floor plans.

This ensures that the plans show the physical space and accurately reflect how it's currently used and furnished, providing a comprehensive view of planning and design.

## DELIVERABLES

- Branded, organized, and detailed floor plans for each retirement community area, including precise measurements and representations of all spaces, furniture, and fixtures.
- Digital and physical copies of the plans are easily accessible for review, planning, and implementation.

## BENEFITS

Precision Floor Plans provide a clear and detailed foundation for all subsequent design and refurbishment decisions, ensuring each refresh element is perfectly tailored to the space. They enhance the efficiency and effectiveness of the design process by providing a comprehensive view of the current state and layout of the property.



# 5

## CHI Design Expert Report

### OBJECTIVE

The CHI Design Expert Report is a foundational phase aimed at conducting a thorough and respectful evaluation of your retirement community's current furniture and décor. This detailed report focuses exclusively on documenting the existing conditions, providing a comprehensive overview without suggesting future design directions or changes.

### PROCESS

#### Comprehensive Evaluation

Our design experts meticulously assess and document the current state of your furnishings and décor. This involves noting each piece's condition, style, and functionality and how it interacts with the overall space. The evaluation is conducted with sensitivity and respect for the existing environment, recognizing the history and choices that have shaped the space.

### DELIVERABLES

- A detailed CHI Design Expert Report that provides an objective evaluation and summary of all existing furniture and décor.
- High-level observations on the space's overall aesthetic and functional dynamics without delving into specific recommendations or critiques.

### BENEFITS

CHI Design Expert Reports offer a neutral and factual baseline of the current interior elements, serving as an essential reference point for future design considerations. They also ensure any future refresh decisions are informed by a thorough understanding of what already exists, preserving the integrity and intent of your original design choices.



# 6 Comprehensive Design Proposal

## OBJECTIVE

The Comprehensive Design Proposal is the heart of the Community Excellence Program, where our design experts bring their creativity, expertise, and understanding of your space together to create a tailored and transformative design plan. This proposal is not just about refreshing the space; it's about reimagining it to enhance the quality of life for residents and ensuring your retirement community is always a step ahead in comfort, style, and functionality.

## PROCESS

### Selection of Furniture and Décor

Our design experts meticulously select new furniture and décor that reflect the latest trends while being sensitive to the unique needs and preferences of your community's elderly residents. The selection process is comprehensive, considering comfort, accessibility, durability, and overall aesthetic appeal. Each piece is chosen not just for its individual qualities but for how it contributes to the harmony and functionality of the entire space.

### Tagging 3D Tour and Creating Image Documents

CHI integrates the selected items into the existing 3D tour of your community, tagging each new piece of furniture and décor in its proposed location. This allows stakeholders to visualize the proposed changes in context and understand how each item will enhance the space. Detailed image documents are also created, providing a visual and descriptive reference for each selected item.

## Budget and Digital Mood Board

A detailed budget is prepared for all the proposed new items, providing clear and transparent costings. This includes a digital mood board showcasing the proposed items and their interplay within the space. This visual tool is not just about aesthetics; it's about telling the story of the space and how it will feel and function after the refresh.

## DELIVERABLES

- A bespoke design proposal document includes detailed descriptions, images, and budgetary pricing of all proposed furniture and décor.
- A tagged 3D tour of the space with all proposed items, allowing for an immersive preview of the refreshed environment.
- A digital mood board reflecting the proposed design vision and aesthetic.

## BENEFITS

CHI's Comprehensive Design Proposals provide a clear, detailed, and visually rich representation of what the refreshed space will look and feel like, facilitating decision-making and stakeholder buy-in. They ensure that every aspect of the new design is carefully considered and chosen to enhance the residents' quality of life and the overall functionality of the space.



# 7 Strategic Roadmap

## OBJECTIVE

The Strategic Roadmap is a pivotal deliverable within the Community Excellence Program, offering a clear and detailed plan for executing the proposed design refresh. This comprehensive timeline includes detailed budgeting phases and milestones, providing you with a transparent and predictable path for transforming your retirement community. It's not just a schedule; it's a tailored strategy designed to ensure a smooth, coordinated, and efficient refresh process.

## PROCESS

### Roadmap Development

CHI's design experts build your Strategic Roadmap with a holistic view of the project, considering all aspects, from the initial design proposal to the final implementation. It outlines all key phases, including planning, procurement, implementation, and review. This step involves deep collaboration with all stakeholders to understand constraints, preferences, and priorities.

### Budgeting Phases

Detailed budgeting phases are integrated into the roadmap, providing you with a transparent and comprehensive plan that eliminates

unexpected surprises. Providing you with a clear understanding of when and how financial resources will be allocated throughout the project, including estimated costs for each refresh phase, from design to delivery and installation, creates certainty and confidence.

## DELIVERABLES

- A detailed Strategic Roadmap document that outlines the entire refresh process, from conception to completion, including all key phases and milestones.
- A comprehensive phase-by-phase budget breakdown of expected expenditures.

## BENEFITS

The Strategic Roadmap provides you with a clear, actionable plan for the refresh, ensuring all parties are aligned and informed at every stage. It helps manage expectations and resources efficiently, reducing the potential for miscommunication or unexpected costs. It also facilitates a smooth refresh process by pre-emptively addressing logistical and financial planning, allowing for proactive rather than reactive decision-making.





# 8

## Client Presentation and Feedback Session

### OBJECTIVE

The Client Presentation and Feedback Session is a crucial juncture in the Community Excellence Program, where the comprehensive design proposal and strategic roadmap are formally presented to stakeholders. This session is not just about showcasing our work; it's a collaborative platform for open discussion, feedback, and alignment, ensuring the final plan resonates with all parties involved and truly reflects the community's needs and vision.

### PROCESS

#### Formal Presentation

CHI's design team prepares and formally presents the completed design proposal and Strategic Roadmap. This interactive session is designed to walk stakeholders through every planning aspect, highlighting key elements and explaining the rationale behind each decision, bringing the proposed changes to life through digital visualizations, mood boards, and the tagged 3D tour.

#### Feedback Collection

Following the presentation, we conduct a thorough feedback session. This is an open forum for stakeholders to ask questions, provide comments, and suggest adjustments. Our team takes detailed notes on all feedback, ensuring every concern and idea is captured and considered.

### DELIVERABLES

- A detailed presentation and feedback session record, including all comments, questions, and discussions.
- A list of action items and potential revisions from the session provides a clear path forward.

### BENEFITS

The Presentation and Feedback Session step ensures the final design and implementation plan fully aligns with your expectations and requirements. It also strengthens our collaborative relationship, building trust and ensuring the final outcome reflects your community's identity and aspirations.



# 9 Design Proposal Revisions

## OBJECTIVE

The Revisions phase is an integral part of the Community Excellence Program, where the CHI Design team refines and adjusts the design proposal and strategic roadmap based on the feedback received during the Client Presentation and Feedback Session. This phase is dedicated to perfecting the plan, ensuring it meets and exceeds client expectations and fully aligns with your vision and needs.

## PROCESS

### Review and Analysis of Feedback

CHI design experts carefully review all notes and feedback from the client session. This involves analyzing comments, suggestions, and any concerns stakeholders raise to understand their implications for the design and planning. Each piece of feedback is considered in the context of the overall design objectives and the practical realities of implementation.

### Adjustments and Refinements

Based on the feedback analysis, the team makes targeted revisions to the design proposal and strategic roadmap. This may involve adjusting layouts, changing materials or furnishings, or rethinking certain aspects of the timeline and budget. We focus on ensuring that every plan element is thoughtfully considered and contributes to creating an optimal living environment for residents.

## DELIVERABLES

- An updated design proposal and Strategic Roadmap reflecting all revisions and adjustments made in response to client feedback.
- A summary document outlining the changes, the reasons behind them, and how they contribute to the overall goals of the refresh.

## BENEFITS

Design Proposal Revisions ensure the final plans are fully tailored to your unique needs, preferences, and feedback, enhancing the quality and impact of the refresh by incorporating diverse perspectives and expert insights into the final plan.



# 10 Final Proposal Documentation

## OBJECTIVE

The Final Documentation phase is the culmination of the Community Excellence Program's Phase 1, where all plans, designs, and details are compiled into a comprehensive and organized set of documents. This phase is about providing a clear, concise, and complete package that will be the definitive guide for implementing the design refresh.

## PROCESS

### Compilation and Organization

Our team meticulously compiles all the design proposal elements, strategic roadmap, and revisions into a unified set of documents. This includes integrating all visual components, price lists, and detailed descriptions into a coherent, easy-to-navigate format. Special attention is given to ensuring the documents are comprehensive, visually appealing, and easy to understand.

### Final Review and Quality Check

Before the final package is delivered, it undergoes a thorough review and quality check. This ensures that every detail is accurate, every inclusion is appropriately documented, and the entire package meets the high standards of the CHI Design team.

## DELIVERABLES

- A complete set of final documents, including the updated design proposal, strategic roadmap, and any revisions or additional notes, is the definitive guide for the upcoming refresh process.
- Digital and physical copies of the documentation are provided in a format that's convenient and accessible for the client.

## BENEFITS

The Final Proposal Documentation provides a clear, detailed, and organized representation of the planned refresh, ensuring you have all the information you need at your fingertips. It is a valuable reference throughout the implementation process, helping keep the project on track and aligned with the agreed-upon vision and objectives.

