



Tulare Local  
Healthcare District

# 2026-2027 Strategic Planning Work Session

February 28, 2026  
Evolutions Conference Room

# Agenda

- Introductions
- Ice Breaker
- Confirmation of Mission, Vision, and Values
- Review 2025-2026 Plan with Results
- Establish New Priorities
- Review Plan Structure
- Adjourn



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Healthcare District

# Ice Breaker

- PICK A NUMBER 1-25



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## Mission



Tulare Local  
Healthcare District

*To manage and utilize District resources to address the health needs of our population.*

## Vision



Tulare Local  
Healthcare District

*To be an outstanding community resource, actively driving and supporting the improved health of our residents.*

# Values

T: *Transformative*

L: *Loyal*

H: *Honest*

D: *Dedicated*



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# 2026 – 2027 Strategic Plan - Draft

# 2023 – 2024 Strategic Plan Scoreboard

1.0 Improve Community Health

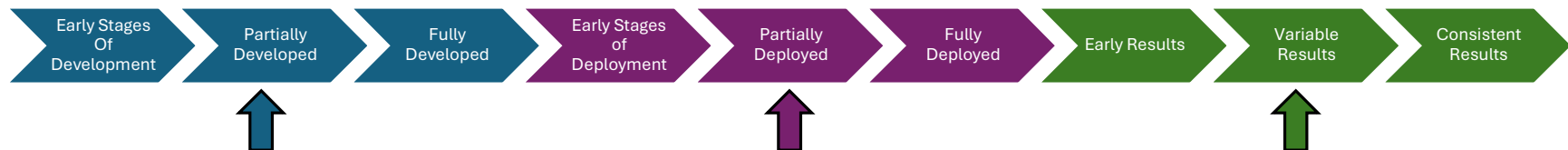
2.0 Demonstrate Outstanding Stewardship

3.0 Improve Community Outreach & Communication

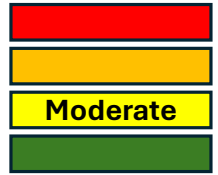
4.0 Ensure Financial Sustainability

5.0 Pursue Performance Excellence

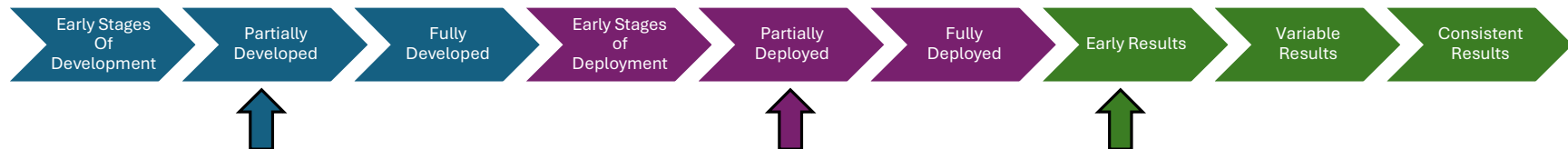
6.0 Leverage new and established facilities to sustain and enhance hospital services



# 1.0 Improve Community Health

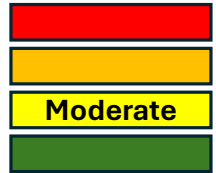


- 1.1 Fill in Community Health Need Gaps
- 1.2 Develop a Community Education Plan
- 1.3 Participate in Healthcare Provider Recruitment & Retention Efforts
- 1.4 Increase Evolutions Member Utilization
- 1.5 Explore Opportunities to Utilize Evolutions Fitness and Wellness Center for Community Health Initiatives



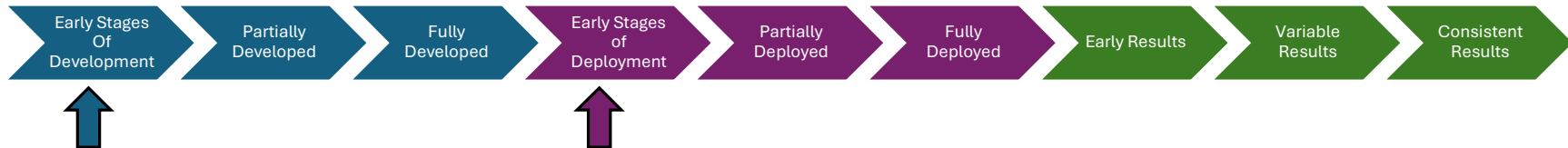
# 1.0 Improve Community Health

## 1.1 Fill in Community Health Need Gaps



**Executive Summary:** The District is in the early stages of filling community health need gaps through initial program development with healthcare partners. These efforts are currently focused on planning and early deployment, with future expansion dependent of finalization of the Tower completion plan.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Continue to Pursue and Support Health Care Related Programs to Address Community Needs</li> </ul>	<ul style="list-style-type: none"> <li>Highlight areas of greatest need and least available services</li> <li>Launched Hero Health at Evolutions, addressing veteran health needs</li> <li>Nutrition Classes under development</li> <li>Annual Heart Health Program in Coordination with Adventist Health</li> <li>Pursue Medical Office Space Expansion</li> </ul>	<ul style="list-style-type: none"> <li>Staff research, development and implementation time</li> </ul>	<ul style="list-style-type: none"> <li>Adventist Health</li> <li>Other Healthcare Providers and Programs</li> </ul>	<ul style="list-style-type: none"> <li>Time and financial resources will be comprehensively evaluated once the Tower plan has been finalized.</li> </ul>	None at this time



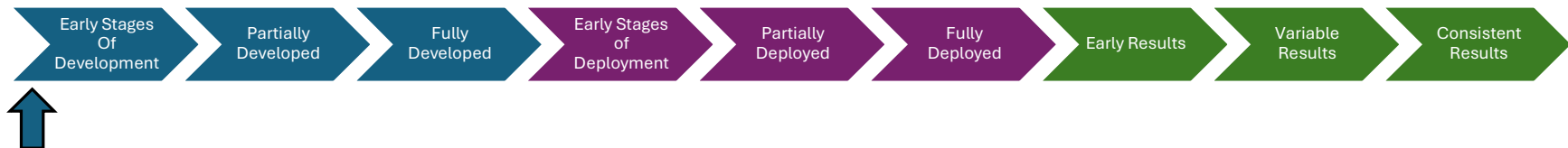
# 1.0 Improve Community Health

## 1.2 Develop a Community Education Plan



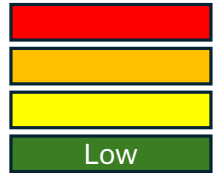
**Executive Summary:** The District is in the early stages of exploring how it can contribute to improved community health education by engaging local leaders and assessing priority needs. Efforts are currently focused on information gathering, with planning and implementation to follow once priorities and resources are defined.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Develop a plan outlining how TLHD can contribute toward the health education of our community.</li> </ul>	<ul style="list-style-type: none"> <li>Confer with local leaders to establish priorities and draft a plan</li> <li>Prioritize opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Staff research time</li> <li>Printed Materials</li> <li>Health Education Classes</li> </ul>	<ul style="list-style-type: none"> <li>Educational leaders</li> <li>Healthcare providers</li> </ul>	<ul style="list-style-type: none"> <li>Time and financial resources will be evaluated once the Tower plan has been finalized.</li> </ul>	None at this time



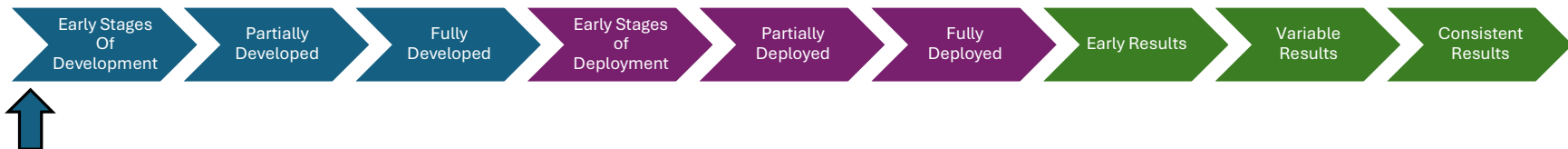
# 1.0 Improve Community Health

## 1.3 Participate in Healthcare Provider Recruitment & Retention Efforts



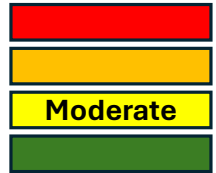
**Executive Summary:** Currently, our most impactful and meaningful contribution to healthcare provider recruitment and retention is the completion of the second-floor tower surgical suites, which will serve as a key driver in attracting physician and specialists to Tulare. Current efforts remain focused on planning and construction readiness, with recruitment impacts expected upon occupancy.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Finish construction of the second floor of the tower and enable occupancy.</li> </ul>	<ul style="list-style-type: none"> <li>Second floor project plan</li> </ul>	<ul style="list-style-type: none"> <li>\$20 million has been targeted toward construction</li> </ul>	<ul style="list-style-type: none"> <li>Adventist Health</li> <li>Community</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate additional opportunities to support physician recruitment and retention opportunities such as the creation of medical office space.</li> </ul>	<ul style="list-style-type: none"> <li>Continue pursuit of major construction objectives</li> </ul>



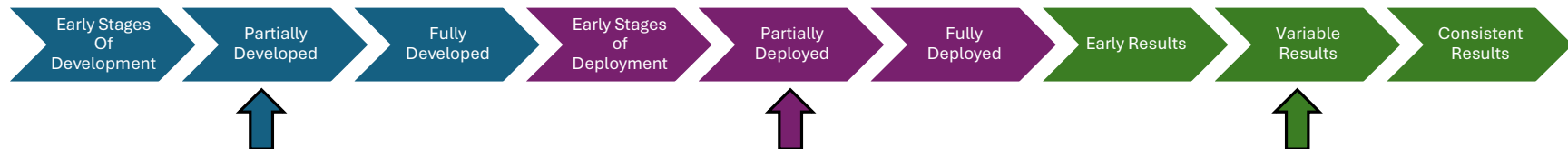
# 1.0 Improve Community Health

## 1.4 Increase Evolutions Member Utilization



**Executive Summary:** Between 2025 and 2026, Evolutions experiences sustained membership growth while shifting focus toward improved utilization through expanded programming, upgraded facilities, enhanced member access tools, and partnerships with multiple access platforms . Utilization initiatives are actively underway.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Total <b>membership increased from 5,936 (2025) to 6,525 (2026)</b></li> <li>Sustained monthly facility <b>visits averaging 20,000 to 25,000/month</b></li> <li>Group exercise and service offerings expanded to support increased utilization</li> <li>Strategic partnerships to expand access and service offerings</li> </ul>	<ul style="list-style-type: none"> <li>MindBody</li> <li>Wellhub</li> <li>FitOn Health</li> <li>Silver &amp; Fit</li> <li>Class Pass</li> <li>Teen Exercise Education Classes</li> <li>Swimming Lessons</li> <li>Expansion of Fit for Life program</li> <li>Ongoing Engagement Events</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Investments in new equipment and supplies to support new programs</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Third party contractors</li> <li>Wellness benefit administrators and access platforms</li> </ul>	<ul style="list-style-type: none"> <li>Additional utilization initiatives under development including loyalty incentives and targeted programming</li> </ul>	<p>Continue to prioritize member experience and expanded scope of service offerings</p>



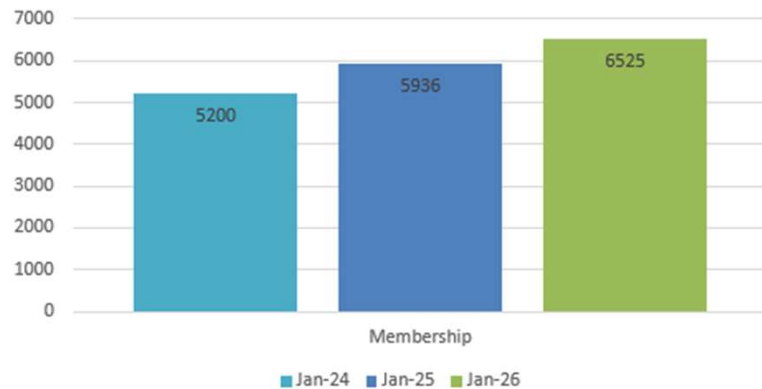
# Evolutions Fitness & Wellness Center



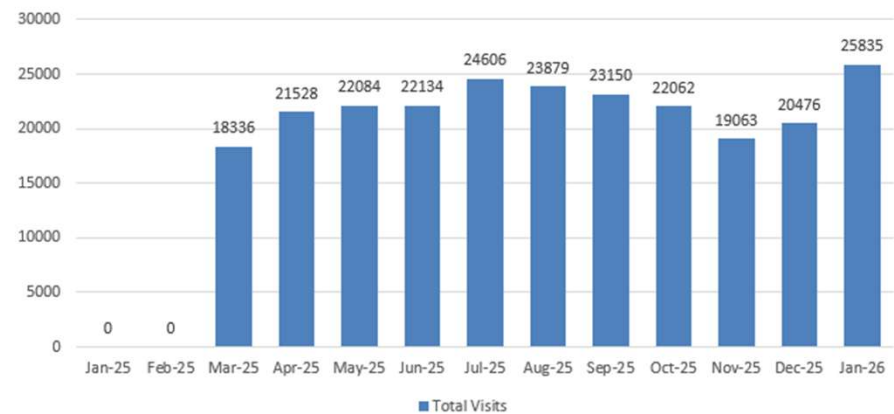
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## Member Utilization Data

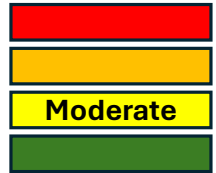
Total Active Memberships



Total Visits



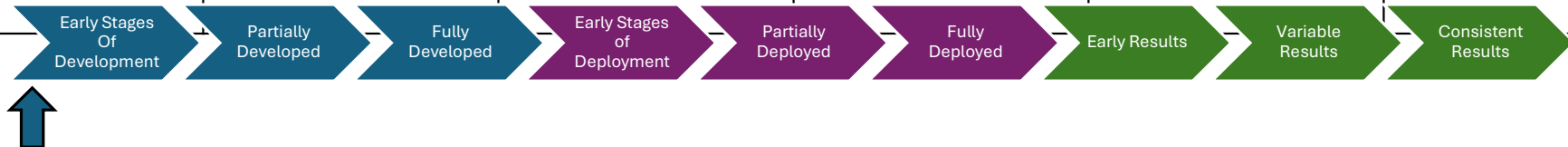
# 1.0 Improve Community Health



## 1.5 Explore Opportunities to Utilize Evolutions Fitness and Wellness Center for Community Health Initiatives

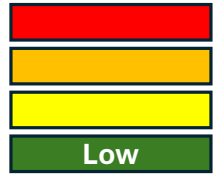
**Executive Summary:** Evolutions is in the development stage of adding new community health programs that include, nutrition classes, new annual heart health event, annual health fair and weight loss program.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Expand our footprint into new areas of community health and wellness initiatives.</li> </ul>	<ul style="list-style-type: none"> <li>Pilot launch of Nutrition Program</li> <li>Ongoing Community Engagement Events</li> <li>Kidney Support Group</li> <li>Evolutions is in the development stage of adding new community health programs that include, nutrition classes, new annual heart health event, annual health fair and weight loss program.</li> </ul>	<ul style="list-style-type: none"> <li>Staff time to research and establish new programs.</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>3<sup>rd</sup> Party Contractors</li> </ul>	<ul style="list-style-type: none"> <li>Possible future revenue generation</li> <li>Consider new programs as pilots and review and assess program continuance.</li> </ul>	<p>Continue to pursue expansion of community health initiatives.</p>



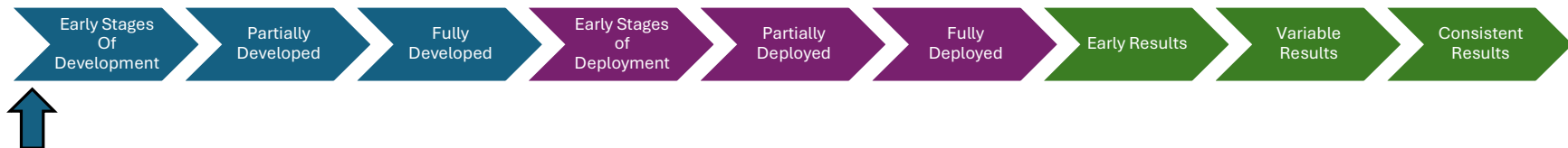
# 1.0 Improve Community Health

## 1.6 Collaborate with Medical Education Partners to Advance Local Medical Education Programs



**Executive Summary:** Advancement of local medical education partnerships has not been a primary focus during this period. Preliminary discussions with COS did not progress, and no additional opportunities have been identified to date.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Collaborate with educators to expand the local healthcare workforce</li> </ul>	<ul style="list-style-type: none"> <li>Explore opportunities to collaborate with medical education experts</li> <li>Radiology program discussions with COS stalled in 2025 and no new opportunities have presented themselves</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Healthcare Systems</li> <li>Educational Organizations</li> </ul>	<ul style="list-style-type: none"> <li>Continue outreach to stakeholders and assess opportunities that arise.</li> </ul>	<p>Re-evaluate this as a District priority.</p>



## 2.0 Demonstrate Outstanding Stewardship

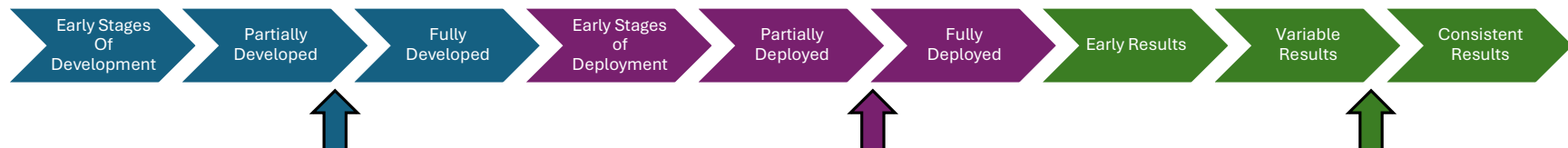


2.1 Develop Plan for Real Estate Development

2.2 Restore & Renew Evolutions Plaza & Gym

2.3 Develop a Property Management Plan

2.4 Be a Responsible Community Steward, Supporting and Promoting Applicable Community Initiatives



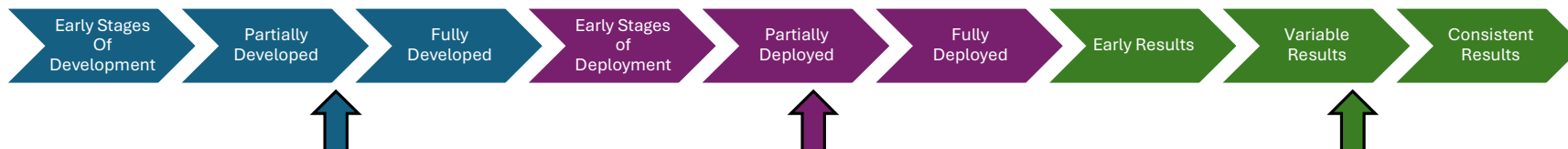
# 2.0 Demonstrate Outstanding Stewardship

## 2.1 Develop Plan for Real Estate Development



**Executive Summary:** The District is actively demonstrating strong stewardship of its real estate assets by advancing a strategic approach to best use, including the successful sale of surplus properties and ongoing evaluation of remaining sites. These efforts have generated significant financial returns and positioned remaining properties for future medical and hospital-supportive development.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Continued focus and refinement to determine best use of District-owned properties</li> <li>Successfully completed the sale of three properties in the Tulare Medical Center resulting in over \$2 million in proceeds and saving on association dues.</li> </ul>	<ul style="list-style-type: none"> <li>Last Tulare Medical Center property listed for sale.</li> <li>Gem Street and Cherry Street properties slated for demolition contingent upon removal of storage items</li> </ul>	<ul style="list-style-type: none"> <li>None current</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>Continued pursuit of buyers</li> <li>Continued analysis of best use</li> </ul>	<ul style="list-style-type: none"> <li>Best perceived use of Gem and Cherry Street properties are for new medical office space and hospital-based departments</li> <li>Tulare Medical Center property slated for sale</li> </ul>



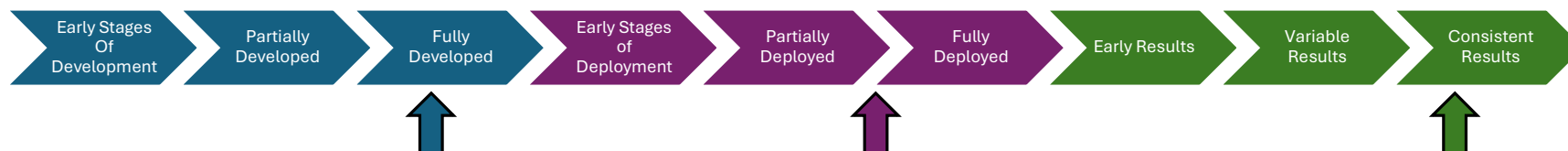
# 2.0 Demonstrate Outstanding Stewardship



## 2.2 Restore & Renew Evolutions Plaza & Gym

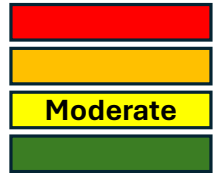
**Executive Summary:** A multi-year reinvestment strategy is underway to restore and modernize Evolutions Plaza and Gym. Deferred maintenance and aging infrastructure are being systematically addressed, improving safety, functionality and member experience while maintaining alignment with budget planning and long-term asset stewardship. Ongoing prioritization will address remaining capital needs and sustain facility performance over time.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Preserve and enhance Evolutions through planned maintenance, capital reinvestment and lifecycle management.</li> <li>Address deferred maintenance and aging infrastructure to improve safety, functionality, and member experience.</li> </ul>	<ul style="list-style-type: none"> <li>Installation of new dehumidifier</li> <li>Installation of athletic flooring and laminate flooring</li> <li>Family locker room remodel</li> <li>Replacement of aging equipment and sale of outdated assets</li> </ul>	<ul style="list-style-type: none"> <li>Significant capital has been allocated for replacement and upgrades at Evolutions Plaza</li> </ul>	<ul style="list-style-type: none"> <li>Evolutions Plaza tenants</li> <li>Evolutions members</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing replacement of aging and outdated equipment</li> <li>Interior paint</li> <li>Atrium remodel</li> <li>Childcare shade structure</li> <li>Landscaping</li> </ul>	<ul style="list-style-type: none"> <li>Continue strategic reinvestment in Evolutions to protect district assets and support ongoing operations.</li> <li>Maintain alignment between capital improvements, budget planning, and long-term facility needs.</li> </ul>



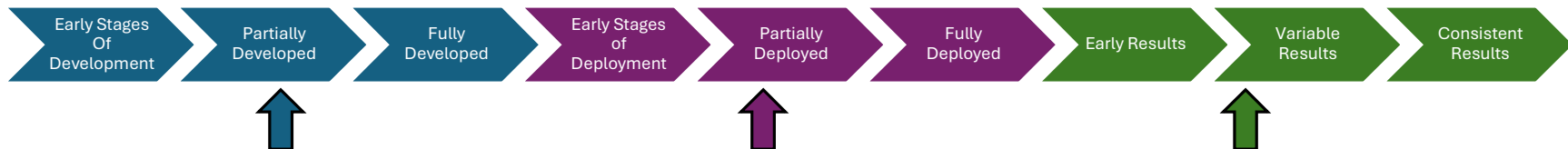
# 2.0 Demonstrate Outstanding Stewardship

## 2.3 Develop a Property Management Plan



**Executive Summary:** The District is developing a structured property management approach focused on lease administration, tenant communications, and fair market value oversight. Foundational tools and processes are in place and being used regularly, with ongoing refinement to improve consistency and efficiency.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Develop a plan to manage all lease agreements, fair market value assessments, and tenant relations and communications</li> </ul>	<ul style="list-style-type: none"> <li>Organize leases, appraisals and site plans to create a working document to be used monthly, reviewing property status</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Tenants</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate workflow and adjust as necessary</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>



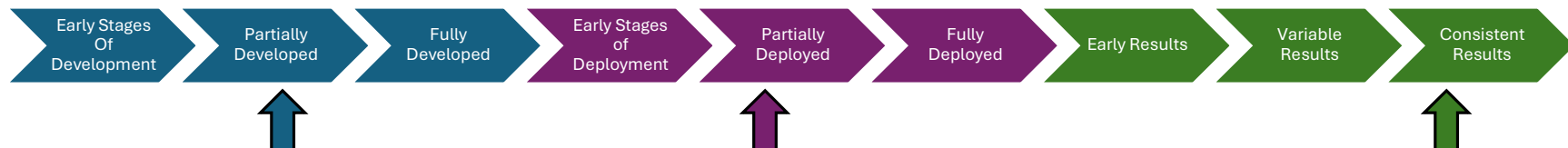
## 2.0 Demonstrate Outstanding Stewardship

2.4 Be an active partner in the business of the communities we represent. Support growth and enhance a positive culture by engaging ourselves with others

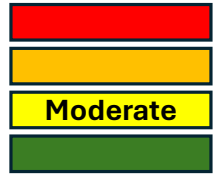


**Executive Summary:** The District continues to be an active and visible partner in the community through ongoing participation in local organizations, events, and leadership roles. These efforts strengthen relationship, support local economic activity, and reinforce a positive community presence.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Accept invitations to participate and seek other ways to be involved in our communities</li> </ul>	<ul style="list-style-type: none"> <li>Active involvement and participation in multiple community events and organizations</li> <li>Kevin Northcraft – Trustee of the Year</li> <li>Chamber Board Representation</li> <li>ACHD Board Representation</li> </ul>	<ul style="list-style-type: none"> <li>Staff Time</li> <li>Marketing Expenses</li> </ul>	<ul style="list-style-type: none"> <li>Community Organizations</li> </ul>	<ul style="list-style-type: none"> <li>Continued involvement in community events and activities</li> </ul>	<ul style="list-style-type: none"> <li>Continued priority</li> </ul>



# 3.0 Improve Community Outreach & Communication

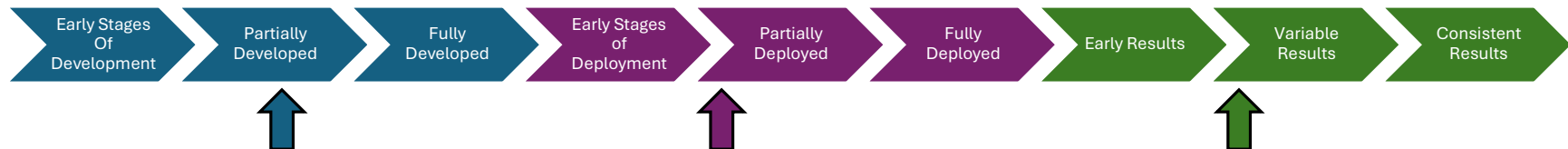


3.1 Expand Community Outreach

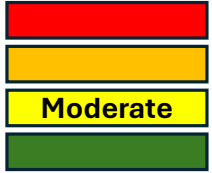
3.2 Improve Community Communication

3.3 Improve Communication with Evolutions Fitness Members

3.4 Develop and publish the Tulare Local Healthcare District Legacy Story



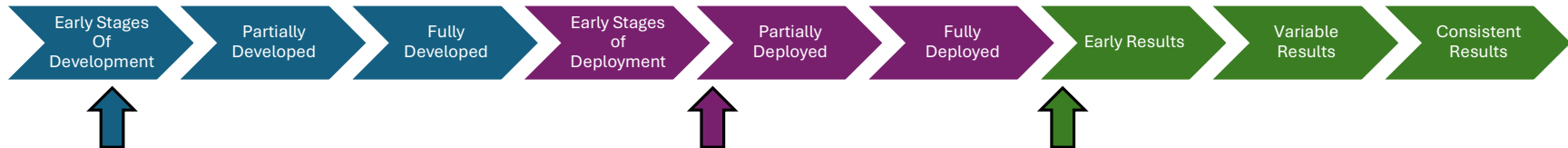
# 3.0 Improve Community Outreach & Communication



## 3.1 Expand Community Outreach

**Executive Summary:** The District has intentionally taken a measured approach to community outreach, focusing on foundational engagement while reserving broader outreach efforts until substantive updates on the Tower project are available. Expanded communication and engagement will occur as construction milestones are reached.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Increase interaction with the community through structured committees and partnerships.</li> <li>Increase community engagement resulting in open dialogue with community leaders regarding District business.</li> </ul>	<ul style="list-style-type: none"> <li>Monthly participation in Chamber Government Affairs Committee and Annual presentation opportunity</li> <li>Participation in AH Town Hall meetings</li> <li>Tower Tours</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> </ul>	<ul style="list-style-type: none"> <li>Community members</li> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Activity will increase once broader Tower construction commences</li> </ul>	<ul style="list-style-type: none"> <li>Leverage tower construction to intensify outreach efforts</li> </ul>



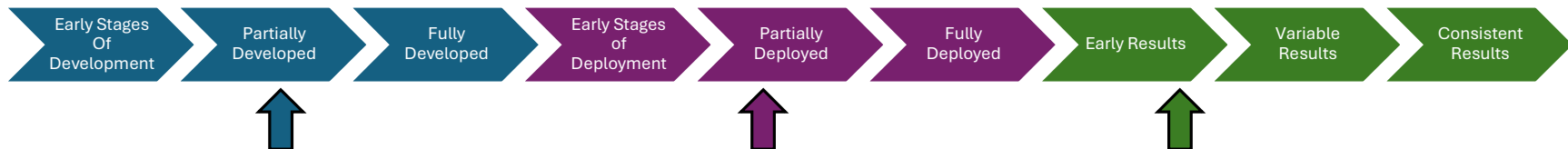
# 3.0 Improve Community Outreach & Communication



## 3.2 Improve Community Communication

**Executive Summary:** The District has prioritized transparent, accurate and timely communication by maintain an updated website, publishing required public information and actively participating in community events. Broader communication efforts are being intentionally sequenced to align with meaningful milestones, ensuring the information shared is accurate, relevant and valuable to the community.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Maintain transparent communications regarding District governance, operations, and activities.</li> <li>Ensure public-facing information is accurate and timely.</li> <li>Build community awareness through direct participation and engagement rather than volume-based messaging.</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing updates to the District website.</li> <li>Increased participation in community events to maintain a visible District presence.</li> <li>Intentional pacing of targeting communication to ensure messaging is substantive and aligned with District priorities.</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Investment in targeted communications efforts such as newsletter distribution, signage, and digital campaigns.</li> </ul>	<ul style="list-style-type: none"> <li>Community members</li> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Expand communication efforts once an approved plan is in place for completion of the 2<sup>nd</sup> floor of the Tower.</li> <li>Increase outreach and storytelling as major District milestones are finalized.</li> <li>Continue evaluating communication channels to ensure quality, relevance and public trust.</li> </ul>	<ul style="list-style-type: none"> <li>Continue prioritizing transparency, accuracy, and compliance in District communications.</li> <li>Ramp up broader outreach as substantive project updates become available.</li> </ul>

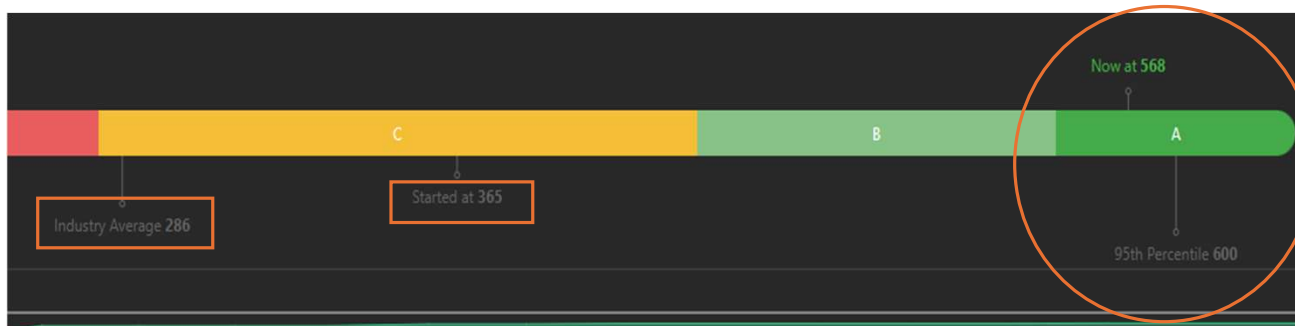


# Evolutions Fitness & Wellness Center



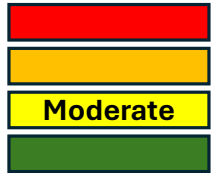
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Online Platform Listing Rating



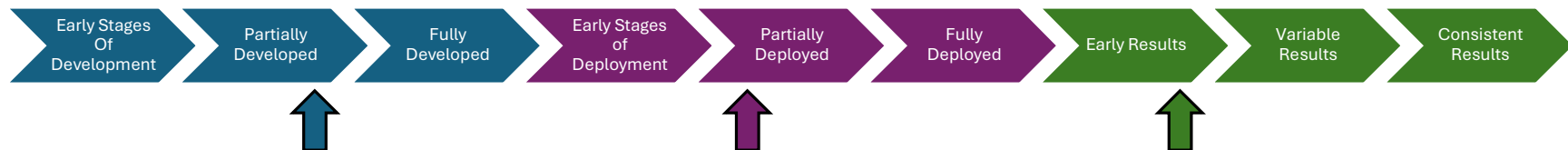
# 3.0 Improve Community Outreach & Communication

## 3.3 Improve Communication with Evolutions Members

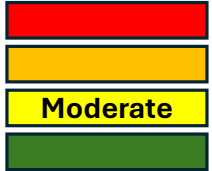


**Executive Summary:** Evolutions has expanded member communications through digital integration and increased in-person outreach, improving consistency, accessibility and engagement.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Established consistent and accessible communication channels for Evolutions members</li> <li>Broadened communication reach by leveraging social media, partner platforms, and automated systems</li> </ul>	<ul style="list-style-type: none"> <li>Launch of branded Evolutions mobile app and integrated website interface</li> <li>Automated communication regarding events, promotions, and account management</li> <li>Increased exposure through SEO and partner networks</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> </ul>	<ul style="list-style-type: none"> <li>Evolutions members</li> <li>Staff</li> <li>Community partners</li> </ul>	<ul style="list-style-type: none"> <li>Implement structured feedback mechanisms to evaluate communication effectiveness</li> <li>Continue refining messaging content and reach</li> </ul>	<ul style="list-style-type: none"> <li>Continue leveraging integrated digital platforms to deliver consistent, timely and accessible communication</li> <li>Monitor engagement metrics and make improvement as needed</li> </ul>



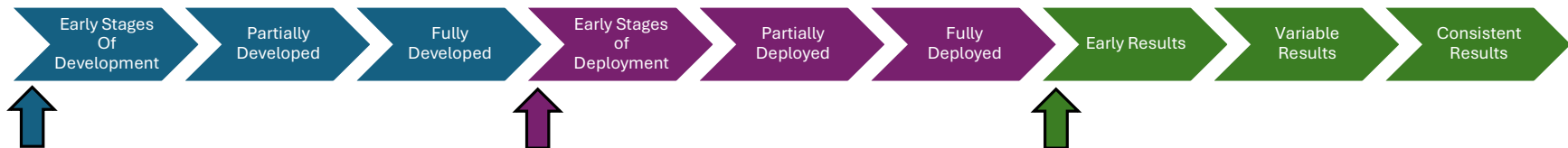
# 3.0 Improve Community Outreach & Communication



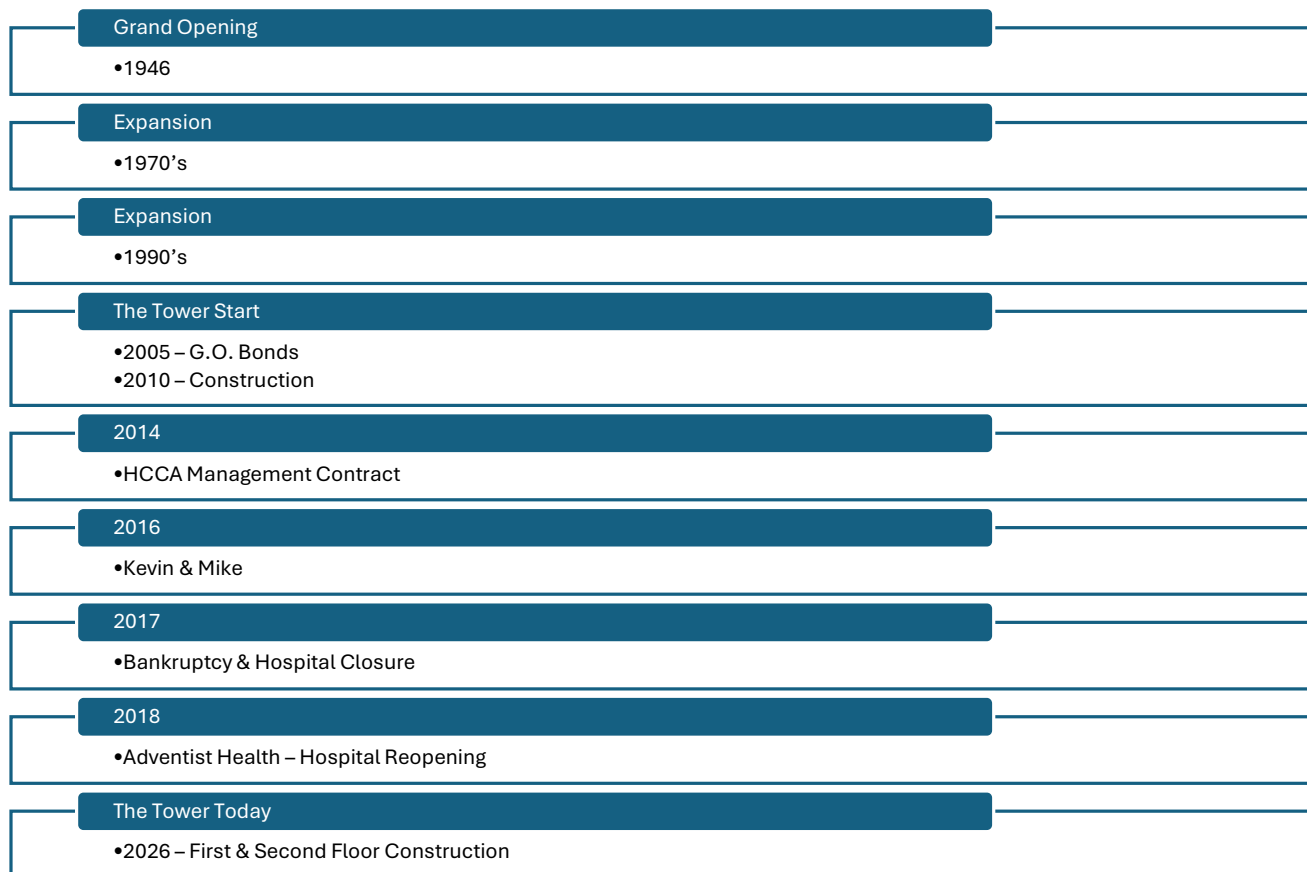
## 3.4 Develop and publish the Tulare Local Healthcare District Legacy Story

**Executive Summary:** We have initiated the expansion of communications platforms by creating social media pages, community newsletters, and quarterly newsletter subscription on our website, and have a plan for regular updates and new information.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Memorialize the history and achievements of the Tulare Local Healthcare District.</li> </ul>	<ul style="list-style-type: none"> <li>Assemble all information available and create a timeline</li> <li>Create display board</li> <li>Create digital display</li> <li>Create pamphlet</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Design and marketing expense</li> </ul>	<ul style="list-style-type: none"> <li>Community members</li> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Completion of one or more of the platforms in 2026</li> </ul>	<ul style="list-style-type: none"> <li>Keep as a priority</li> </ul>



# The Tulare Local Healthcare District Legacy Story



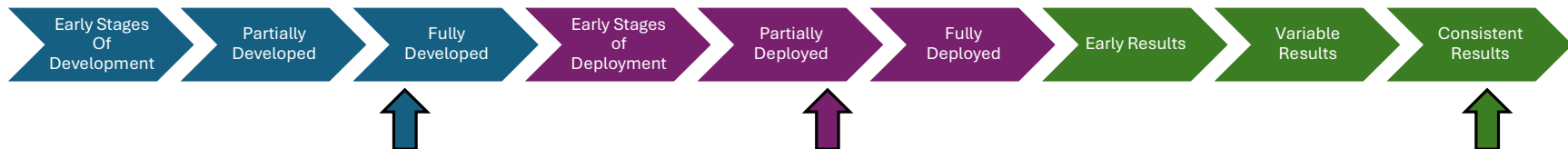
## 4.0 Ensure Financial Sustainability



4.1 Pursue Other Sources of Capital

4.2 Maintain Operational Cash Reserve

4.3 Review all Service Contracts and Modify as Appropriate



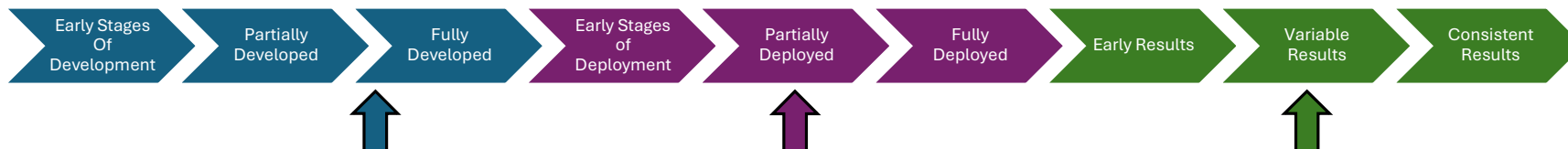
# 4.0 Ensure Financial Sustainability

## 4.1 Pursue Other Sources of Capital



**Executive Summary:** The District is strengthening financial sustainability by leveraging external funding sources to support major capital projects, including seismic compliance and tower completion.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Seek alternative sources of funding for the capital projects required to meet seismic compliance and completion of the Tower.</li> </ul>	<ul style="list-style-type: none"> <li>The Small Rural Hospital Relief Program has enabled the District to pursue all seismic requirements with up to 90% reimbursement from HCAI</li> <li>Many additional funding sources have been considered, but found to be viable at this point – Philanthropy, Revenue Bonds, Loans from others, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Fees</li> <li>Consultation</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Amounts will be adjusted as cash is needed for capital improvements.</li> </ul>	<ul style="list-style-type: none"> <li>We have enjoyed early success in this strategy, and we should continue this path.</li> </ul>



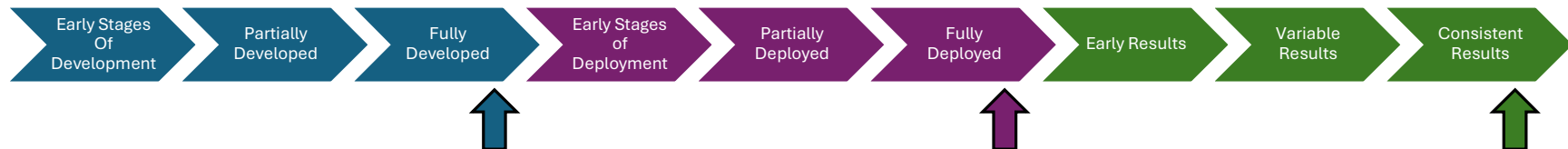
# 4.0 Ensure Financial Sustainability



## 4.2 Maintain Operational Cash Reserve

**Executive Summary:** The District has established and is maintaining an operational cash reserve equal to approximately 90 days of operating expenses to support financial stability and risk management. This reserve is clearly identified on the balance sheet and will be maintained and adjusted by Board action as necessary.

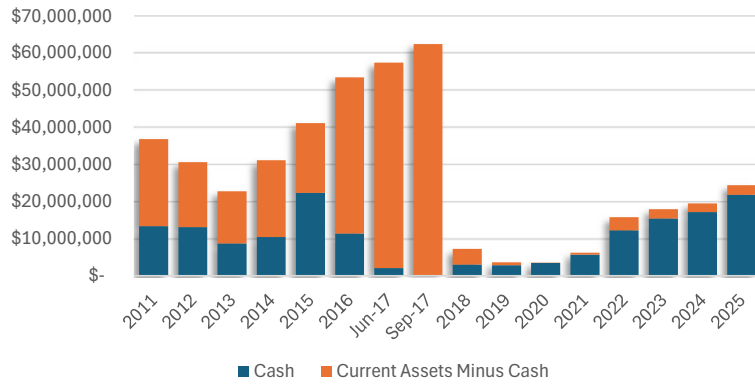
Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>A cash reserve equal to 90 days of operating expenses has been established.</li> </ul>	<ul style="list-style-type: none"> <li>The balance sheet reflects the reserve amount for easy identification.</li> </ul>	<ul style="list-style-type: none"> <li>\$1M</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Continue reserve and adjust by Board vote if deemed necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Continue as is</li> </ul>



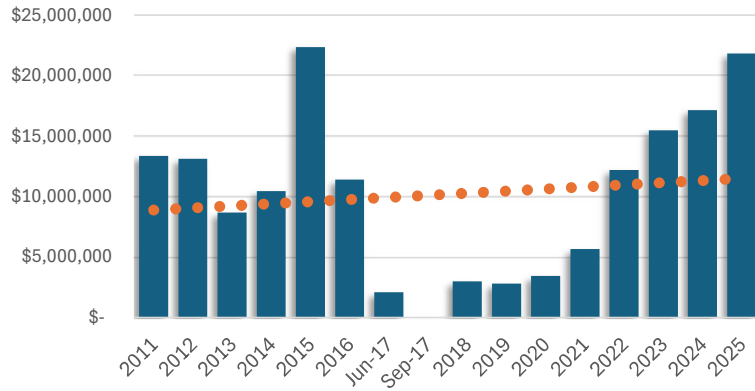


Tulare Local  
Healthcare District

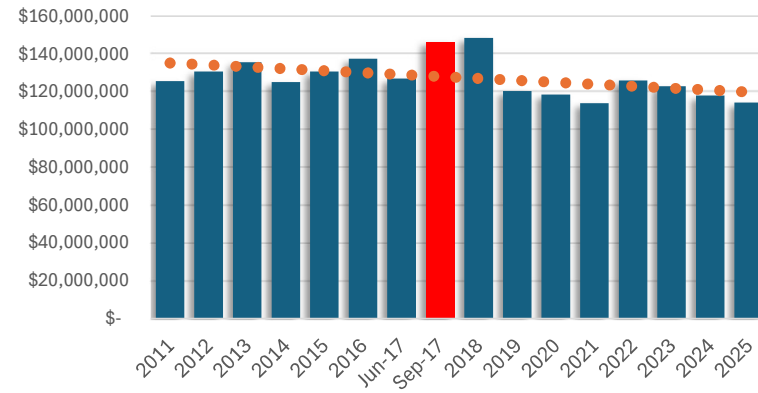
### Current Assets



### Cash



### Total Liabilities



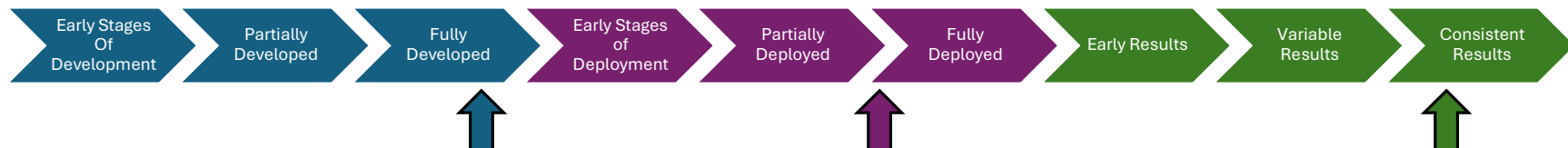
# 4.0 Ensure Financial Sustainability



## 4.3 Review all Service Contracts and Modify as Appropriate

**Executive Summary:** A review of all service contracts has been completed to ensure appropriate cost control, service quality, and alignment with operational needs. Contract oversight is now embedded as a standard practice, with ongoing review and modification as needed.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Review all contracts and seek alternative solutions.</li> </ul>	<ul style="list-style-type: none"> <li>All contracts have been reviewed and desired changes have been implemented. Ongoing evaluation of contracts scheduled annually, or as deemed necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Research</li> <li>Implementation</li> <li>Training</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Board members</li> <li>Evolutions Members</li> </ul>	<ul style="list-style-type: none"> <li>Continued review of contracts and recommend changes as deemed appropriate</li> </ul>	<ul style="list-style-type: none"> <li>On track - Continue</li> </ul>



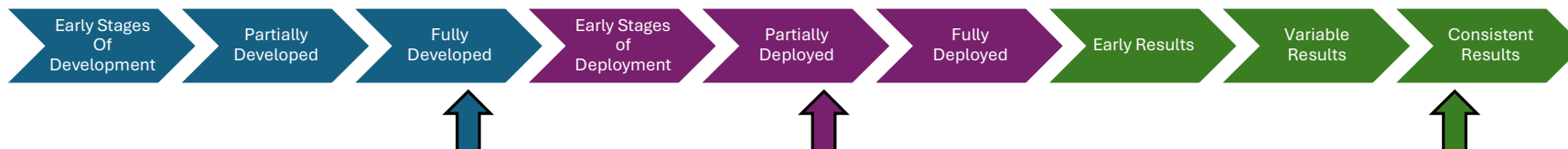
# 4.0 Ensure Financial Sustainability



## 4.5 Meet Evolutions Financial Targets

**Executive Summary:** Evolutions has achieved strong and sustainable financial performance through disciplined budget management, improved internal controls, and strategic use of automation. Membership growth and operational efficiencies have translated into performance that exceeds budgeted targets while maintaining financial stability.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Full transition to Mindbody platform, standardizing billing, collections and member account management.</li> <li>Expansion of partnerships with third-party benefit administrators and access platforms to diversify revenue streams</li> </ul>	<ul style="list-style-type: none"> <li>Full transition to Mindbody platform</li> <li>Refinement and automation of monthly billing, collections, and member account management processes</li> <li>Automation of annual promotions</li> <li>Use of Mindbody for room-rental management</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> </ul>	<ul style="list-style-type: none"> <li>Further expand revenue generating services that align with existing operations, including non-inventory-based offerings and non-membership class options</li> <li>Continue monitoring financial performance and adjust strategies as needed to maintain positive operating margins</li> </ul>	<ul style="list-style-type: none"> <li>Evolutions is performing ahead of financial targets and has established systems that support continued financial sustainability.</li> <li>Maintain current operational and financial strategy while selectively pursuing opportunities that enhance revenue without increasing financial risk.</li> </ul>



# 5.0 Pursue Performance Excellence

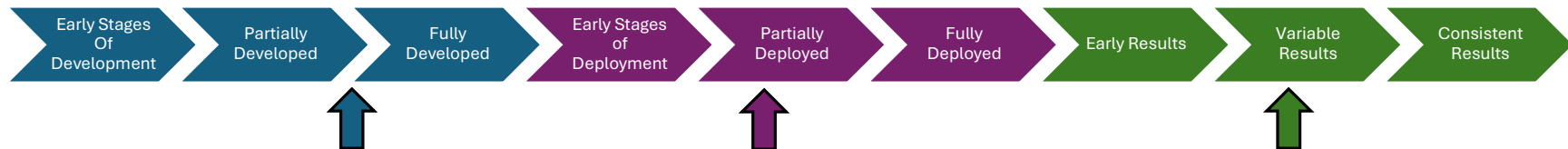


5.1 Establish Excellence Criteria

5.2 Improve Employee Engagement

5.3 Improve Member Satisfaction (Evolutions)

5.4 Review and Revise all Policies and Resolutions as Appropriate



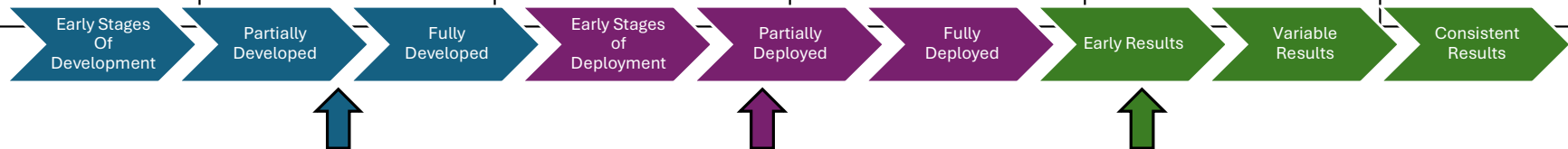
# 5.0 Pursue Performance Excellence

## 5.1 Establish Excellence Criteria



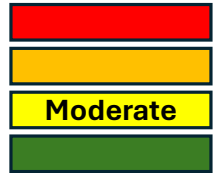
**Executive Summary:** Operational excellence is being measured through progress toward the CSDA High-Performing District Self-Assessment Checklist/ The ACSM Facility Guidelines has been identified as a potential benchmark specific to Evolutions Fitness & Wellness Center. These external frameworks are supported by internally defined KPIs and the ongoing development and implementation of standard operating procedures to ensure consistency, efficiency and accountability.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Establish clear, measurable criteria to define and evaluate performance excellence at both the District and Evolutions levels.</li> <li>Create repeatable systems that promote consistency, accountability and operational discipline.</li> <li>Monitor performance using defined KIPs to support data-driven decision-making.</li> </ul>	<ul style="list-style-type: none"> <li>Progress toward alignment with the CSDA High-Performing District Checklist</li> <li>Identification of ACSM Facility Guidelines as potential operational benchmark for Evolutions</li> <li>Development and implementation of SOPs</li> <li>Establishment and monitoring of KPIs</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Continue refining SOPs and KPIs as operations mature and evolve</li> <li>Periodic reassessment of alignment with CSDA criteria</li> <li>Adjust excellence criteria as organizational needs and priorities evolve</li> </ul>	<ul style="list-style-type: none"> <li>The District is on track and should continue advancing performance excellence through structured standards, consistent measurement and ongoing operational refinement.</li> </ul>



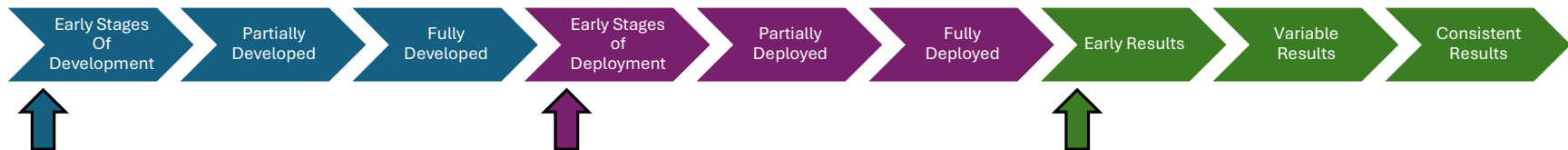
# 5.0 Pursue Performance Excellence

## 5.2 Improve Employee Engagement



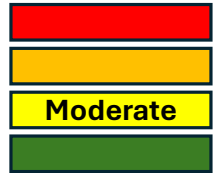
**Executive Summary:** Employee engagement efforts are in the early stages of formal development. While the District has seen positive engagement through an annual all-staff event, additional systems are needed to consistently gather feedback, monitor retention and improve the employee experience across the organization.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Establish structured and repeatable methods to measure employee engagement and satisfaction</li> <li>Improve retention by identifying trends and responding to employee feedback</li> <li>Strengthen onboarding and offboarding processes to support employee success and continuity</li> </ul>	<ul style="list-style-type: none"> <li>Continue annual staff engagement event to support culture and connection</li> <li>Develop a system of regular employee feedback, including pulse survey and targeted check-ins</li> <li>Establish baseline engagement and retention metrics</li> <li>Implement improved onboarding and offboarding process</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Potential future survey and HR support tools</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Leadership &amp; Board members</li> </ul>	<ul style="list-style-type: none"> <li>Expand engagement efforts as feedback systems and data become available</li> <li>Refine strategies based on survey results, retention trends and employee input</li> </ul>	<ul style="list-style-type: none"> <li>Employee engagement should remain a priority, with continued development of formal feedback and retention systems to build on early momentum.</li> </ul>



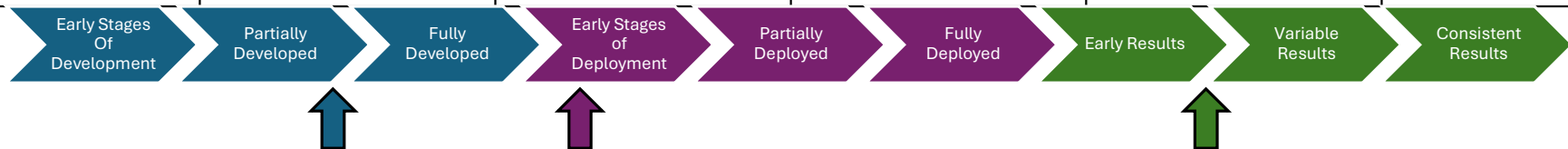
# 5.0 Pursue Performance Excellence

## 5.3 Improve Member Satisfaction (Evolutions)



**Executive Summary:** Member satisfaction to Evolutions has been advanced primarily through focused improvements to the member experience, including facility cleanliness, equipment and facility upgrades, staff training in customer service and hospitality, and expanded member communications. With the launch of the new website and mobile app, we now have the ability to capture member feedback, creating an opportunity to establish formal satisfaction metrics and ongoing monitoring.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Improve overall member satisfaction by enhancing the quality, cleanliness and functionality of the facility</li> <li>Deliver and consistent, positive member experience through service standards</li> <li>Establish measurable satisfaction metrics using member feedback tools</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing focus on facility cleanliness, maintenance, and appearance</li> <li>Continued investment in equipment updates and addressing deferred maintenance</li> <li>Staff training focused on member experience</li> <li>Expansion of member-facing communications and access</li> <li>Utilize app and web based tools to collect member feedback</li> <li>Establish baseline satisfaction metrics based on member feedback data</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Ongoing operational and facility investments</li> </ul>	<ul style="list-style-type: none"> <li>Members</li> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Leverage digital feedback tools to refine services and address member concerns in real time</li> <li>Adjust operational priorities based on satisfaction trends and recurring feedback themes</li> <li>Continue aligning facility and service improvements with member expectations</li> </ul>	<ul style="list-style-type: none"> <li>Member Satisfaction efforts are producing early results and should continue to evolve through formalized feedback metrics and data-driven service improvements.</li> </ul>



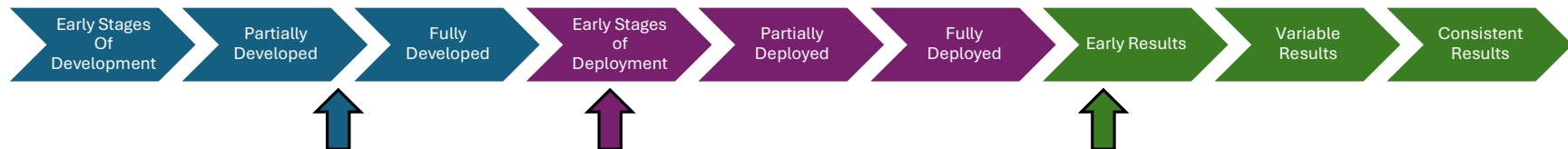
# 5.0 Pursue Performance Excellence



## 5.4 Review and Revise all Policies and Resolutions as Appropriate

**Executive Summary:** We have undertaken two initiatives: the comprehensive cataloging of all board resolutions dating back to the District’s incorporation in 1946, and the ongoing development and refinement of both District and Evolutions policies. Together, these efforts strengthen governance clarity, compliance, and operational consistency.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Establish a complete, accurate record of all Board resolutions to ensure clarity</li> <li>Develop, maintain and update policies to clearly define expectations and support effective operations</li> <li>Implement a structured, recurring review process for policies</li> </ul>	<ul style="list-style-type: none"> <li>Near-completion of log of all resolutions</li> <li>Ongoing development of policies as operational needs arise, including Board review and approval</li> <li>Implementation of an annual policy review process informed by legal requirements and governance best practices</li> <li>Identification of additional policies as needed.</li> </ul>	<ul style="list-style-type: none"> <li>Staff time</li> <li>Legal Review</li> </ul>	<ul style="list-style-type: none"> <li>Staff</li> <li>Board members</li> </ul>	<ul style="list-style-type: none"> <li>Finalize the resolution catalog and transition focus to systematic policy review and development</li> <li>Refine policy governance processes to ensure policies remain current, relevant and enforceable.</li> </ul>	<ul style="list-style-type: none"> <li>The District is on track and should continue to advance resolutions and policy management as coordinated initiatives.</li> </ul>



# 6.0 Leverage new and established facilities to sustain and enhance hospital services



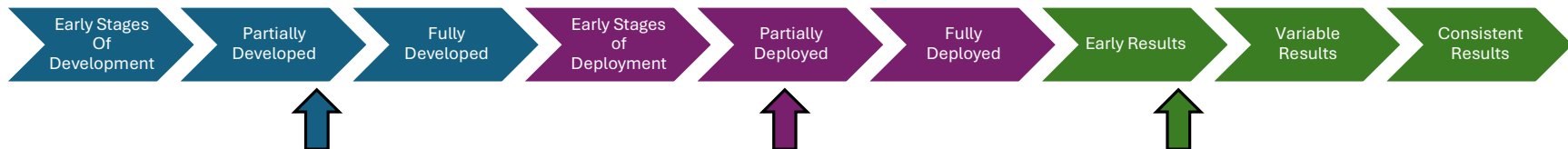
6.1 Maximize Investment in Tower Completion

6.2 Complete New Hospital Tower Construction

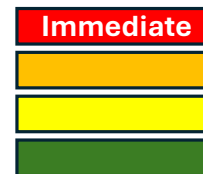
6.3 Facilitate Community Support

6.4 Secure Sustainable Funding for Facility Upkeep

6.5 Enhance Landlord-Tenant Collaboration



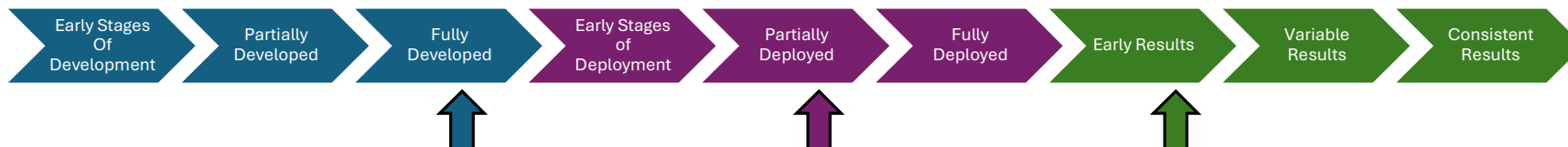
# 6.0 Leverage new and established facilities to sustain and enhance hospital services



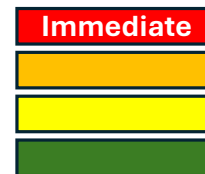
## 6.1 Maximize Investment in Tower Completion

**Executive Summary:** We remain fully focused on completing the Tower as our highest financial and strategic priority, recognizing it as the most critical investment for sustaining and expanding hospital services. All planning, funding and implementation efforts continue to be aligned toward advancing tower completion and obtaining occupancy.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>The second floor of the tower provides the greatest opportunity to attract physician specialists to our community.</li> <li>Other projects have been pursued to maintain an active permit and move closer to completion.</li> </ul>	<ul style="list-style-type: none"> <li>A validation report was completed identifying all necessary elements to occupy the second floor.</li> <li>An RFP has been released seeking bids on this work.                             <ul style="list-style-type: none"> <li>Elevators &amp; Dumbwaiters</li> <li>Helipad</li> <li>Gyp Board</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Approx. \$20M</li> <li>Staff Time</li> </ul>	<ul style="list-style-type: none"> <li>Adventist Health</li> <li>Board members</li> <li>Community</li> <li>Staff</li> </ul>	<ul style="list-style-type: none"> <li>Verify capability once bids are received and reviewed.</li> </ul>	<ul style="list-style-type: none"> <li>We are on the right track and will continue forward.</li> </ul>



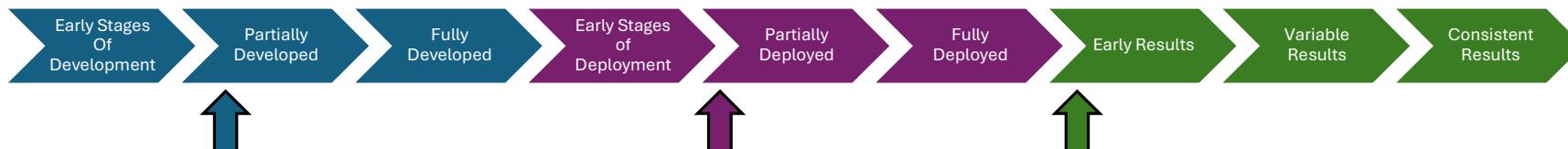
# 6.0 Leverage new and established facilities to sustain and enhance hospital services

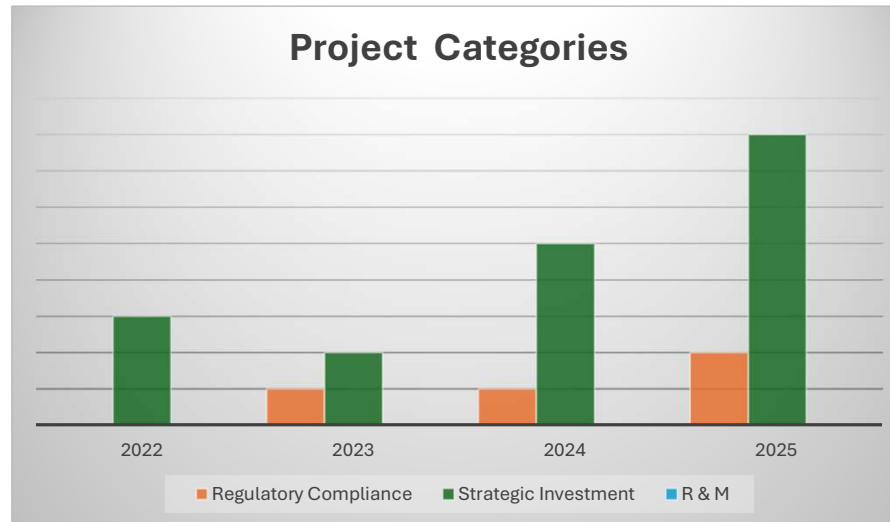
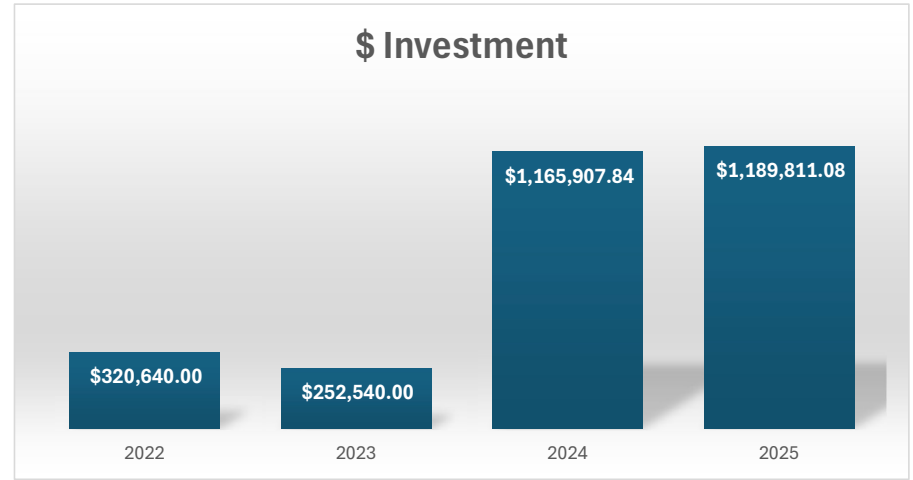
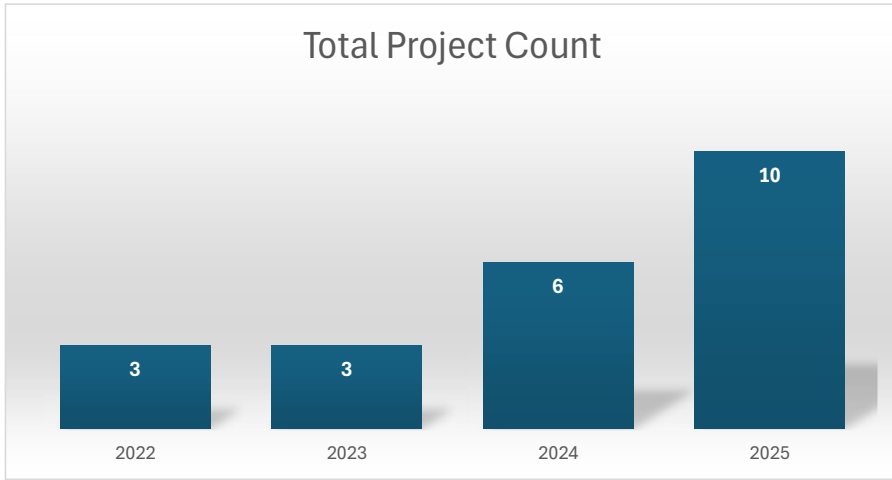


## 6.2 Complete New Hospital Tower Construction

**Executive Summary:** The District is actively advancing towards completion of the first and second floor of the Tower by evaluating funding options and initiating the final steps to bring the emergency and surgical floors online. Current efforts are focused on deploying available capital, securing remaining resources and moving construction forward toward occupancy readiness.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Multiple strategies have been analyzed to fund tower construction.</li> <li>The District presently has \$20M to invest in the completion of the surgical floor.</li> <li>The remainder of the tower will require future consideration.</li> </ul>	<ul style="list-style-type: none"> <li>A validation report has been completed identifying all necessary elements to occupy the second floor.</li> <li>An RFP has been released seeking bids on this work.</li> <li>Philanthropy continues to be explored</li> </ul>	<ul style="list-style-type: none"> <li>Approx. \$20M from cash</li> <li>Staff Time</li> </ul>	<ul style="list-style-type: none"> <li>Adventist Health</li> <li>Board members</li> <li>Community</li> <li>Staff</li> </ul>	<ul style="list-style-type: none"> <li>Verify capability once bids are received and reviewed.</li> </ul>	<ul style="list-style-type: none"> <li>We are on the right track and will continue forward.</li> </ul>





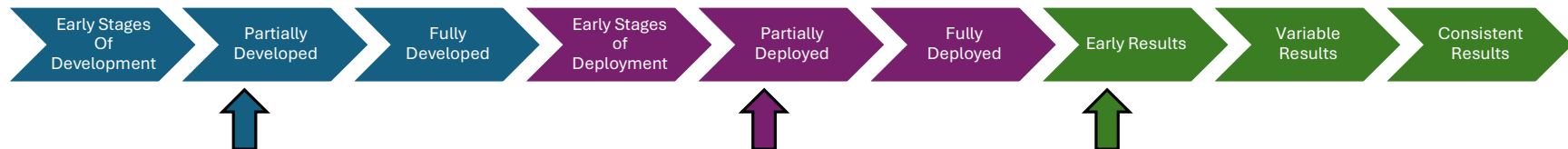
# 6.0 Leverage new and established facilities to sustain and enhance hospital services



## 6.3 Facilitate Community Support

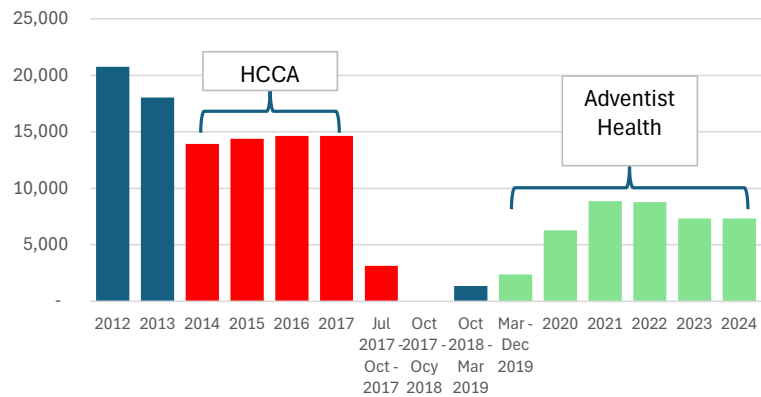
**Executive Summary:** We have taken a measured and intentional approach to community communications as we approach completion of a fully developed plan for first and second floor construction. This approach ensures that forthcoming announcement reflect the substantive progress made and deliver the most impactful milestone the District has achieved in more than a decade.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>The second floor of the tower provides the greatest opportunity to attract physician specialists to our community. We have saved enough cash to pursue this project.</li> <li>The remainder of the tower will require future consideration.</li> </ul>	<ul style="list-style-type: none"> <li>The Chamber of Commerce Government Affairs Committee has been utilized monthly for updates.</li> <li>Collaboration with Adventist Health on a newsletter is underway</li> <li>Tower tours</li> </ul>	<ul style="list-style-type: none"> <li>\$5,000 - \$10,000</li> <li>Staff Time</li> </ul>	<ul style="list-style-type: none"> <li>Adventist Health</li> <li>Board members</li> <li>Community</li> <li>Staff</li> </ul>	<ul style="list-style-type: none"> <li>Ramp up communication once broader construction begins.</li> </ul>	<ul style="list-style-type: none"> <li>We are on the right track and will continue forward.</li> </ul>

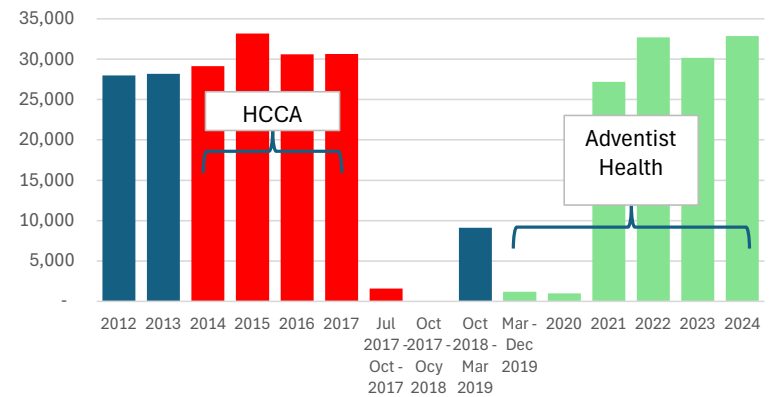


# Hospital Services

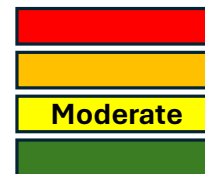
Total Patient Days (Inpatient Acute)



Emergency Visits



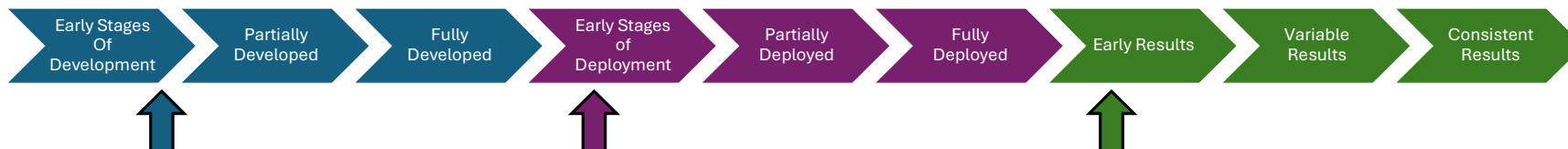
# 6.0 Leverage new and established facilities to sustain and enhance hospital services



## 6.4 Secure Sustainable Funding for Facility Upkeep

**Executive Summary:** We have taken a disciplined approach to securing sustainable funding for ongoing facility upkeep while prioritizing available resources toward Tower construction. Ongoing financial analysis and projected revenue are being used to ensure long-term maintenance needs can be met without compromising critical capital investments.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Most of our existing cash is being committed to the completion of the surgical floor.</li> <li>Taxpayer revenue continues and will replenish funds for upkeep.</li> </ul>	<ul style="list-style-type: none"> <li>Financial analysis will be reviewed once bids are submitted to ensure adequate resources to compete targeted construction and maintain liquidity.</li> </ul>	<ul style="list-style-type: none"> <li>\$1M in reserve funds has been allocated</li> </ul>	<ul style="list-style-type: none"> <li>Adventist Health</li> <li>Board members</li> <li>Community</li> <li>Staff</li> </ul>	<ul style="list-style-type: none"> <li>Continued focus on construction costs and projected cash flow.</li> </ul>	<ul style="list-style-type: none"> <li>We are on the right track and will continue forward.</li> </ul>



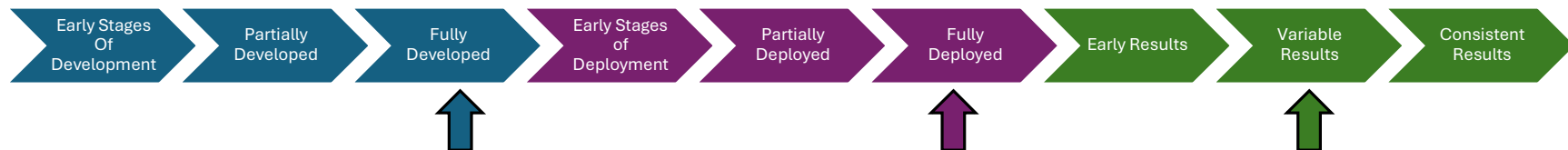
# 6.0 Leverage new and established facilities to sustain and enhance hospital services



## 6.5 Enhance Landlord-Tenant Collaboration

**Executive Summary:** The District maintains a strong and collaborative landlord-tenant relationship with Adventist health through consistent communication and regular executive level engagement. Ongoing dialogue ensures alignment on operational priorities, facility planning and long-term strategies to support sustainable hospital services.

Objectives and Key Results	Initiatives and Projects	Resource Allocation	Stakeholder Engagement	Future Outlook & Adjustments	Conclusion and Recommendations
<ul style="list-style-type: none"> <li>Maintain open channels of communication with Adventist Health, both locally and with Roseville executives.</li> </ul>	<ul style="list-style-type: none"> <li>Monthly Zoom meetings occur with District staff and Adventist Health local executive leadership.</li> </ul>	<ul style="list-style-type: none"> <li>Staff Time</li> </ul>	<ul style="list-style-type: none"> <li>Adventist Health</li> <li>Board members</li> <li>Community</li> <li>Staff</li> </ul>	<ul style="list-style-type: none"> <li>Continue dialogue and ensure alignment.</li> </ul>	<ul style="list-style-type: none"> <li>We are on the right track and will continue forward.</li> </ul>



**New Priorities - ?**

# **Review Plan Structure**

**1.0 Improve Community Health**

**2.0 Demonstrate Outstanding Stewardship**

**3.0 Improve Community Outreach & Communication**

**4.0 Ensure Financial Sustainability**

**5.0 Pursue Performance Excellence**

**6.0 Leverage new and established facilities to sustain and  
enhance hospital services**