

FINAL REPORT

OF THE

SSAFE SUSTAINABILITY PLANNING TASK FORCE



Senior Stewards
Acting For the Environment

Senior Stewards Acting for the Environment (SSAFE) is a charitable non-profit organization representing residents of affiliated senior living communities who are committed to climate action, including advancing the use of clean energy and promoting sustainability and environmental stewardship.



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Executive Summary

In the spring of 2025, SSAFE established a Sustainability Planning Task Force to guide senior living communities in developing comprehensive campus-wide sustainability plans. This report summarizes the task force's findings, conclusions, and recommendations based on focus group discussions with nine SSAFE chapters conducted between October 2025 and February 2026.

Key Findings and Conclusions:

- Interest in sustainability planning is growing, but no participating community has fully developed a plan with long-term goals, timelines, and measurable indicators. Focus group feedback indicates a growing need for comprehensive campus-wide sustainability plans.
- Sustainability initiatives are generally more successful when residents, management, staff and governing boards work collaboratively. Financial constraints, lack of transparency and poor communication often hinder progress.
- Data gaps act as barriers to sustainability planning. Many communities rely on outside consultants to gather data, conduct studies and assist in developing sustainability plans. Residents, however, frequently have had limited input.
- Several communities have forged local partnerships with universities and other public and private organizations. These collaborations provide expertise and strengthen ties to the community.
- Most communities lack well developed volunteer and staff recruitment, education, and training programs. Building capacity in these areas is essential to successfully developing and implementing a community wide sustainability plan.

Recommendations:

- Every senior living community (SLC) should adopt a comprehensive, multi-year sustainability plan consistent with overarching strategic objectives approved by its corporate board.
- Communities should create regular opportunities for residents, management and governing board members to discuss sustainability planning and implementation. Successful sustainability initiatives typically depend on open



channels of communications, meaningful collaboration, and visible support from organizational leaders.

- Communities should encourage ongoing dialogue between resident leaders and management throughout the budget development process.
- Reliable data helps communities to establish sustainability priorities, evaluate alternatives, measure progress and make informed spending decisions. Key sustainability indicators should be tracked and reported, including energy use, greenhouse gas emissions, water consumption, waste generation, and transportation patterns.
- SLCs should actively engage residents throughout consultant-led sustainability studies and analyses. Efforts also should be directed at improving coordination among resident committees, staff and other stakeholders.
- SLCs should seek to establish partnerships with nearby universities, other non-profits and government agencies. Accessing the resources and knowledge base of these institutions can help an SLC advance its sustainability goals.
- SLCs should invest in the people, knowledge, and organizational structures needed to sustainability initiatives over time. That's why staff and volunteer recruitment, education, and training programs are so important.

Suggested SSAFE Follow-up Activities:

The task force suggests that the SSAFE Board and staff consider establishing a separate Sustainability Planning Work Group, developing a chapter progress-reporting system, and creating short educational videos to share key task force recommendations more broadly.



Chapter 1

Introduction

Purpose of Report The Sustainability Planning Task Force was established in the spring of 2025 to offer guidance to senior living communities on developing and implementing comprehensive, campus-wide sustainability plans in keeping with the provisions of Goal III of SSAFE’s Five-Year Strategic Plan (Appendix A). The task force consisted of residents from six SSAFE chapters (see Appendix B), selected for their broad knowledge of related activities and plans at their respective campuses as well as a strong commitment to systematic sustainability planning and execution.

This report summarizes the task force’s findings, conclusions and recommendations. Readers of this report are encouraged to use the information it contains in conjunction with other tools available on the SSAFE website (<https://ssafe.org/>), including the SSAFE Pathway to Net Zero, the Energy and GHG Audit RFP, the Unit Turnover Guide, and the Green Building Certification Review (see Appendix C for capsule descriptions and weblinks to these SSAFE tools).

Framework for Sustainability Planning The study group’s initial task was to develop a working definition of a sustainability plan along with the principal components of such a plan. Over the course of several meetings, the task force reached consensus on the following global definition of an environmental sustainability plan:

An environmental sustainability plan is a strategic document, supported by the organization’s management, that outlines how a community will operate over the long term in a sustainable and economically viable manner, with a primary focus on reducing environmental impacts and addressing the effects of climate change.

The task force’s statement (see Appendix D) also identified the following key components of an environmental sustainability plan: (a) energy efficiency and greenhouse gas reductions; (b) land use and habitat; (c) sustainable purchasing; (d) sustainable transportation; (e) waste reduction; and (f) water conservation. The task force’s report focuses primarily on energy management because it is the area in which a senior living community can most directly impact the effects of climate change.

It is important to note that the environmental sustainability statement also reflects several assumptions that guided the task force’s work. First, collaboration between residents and management leads to more effective sustainability planning and execution. Second, plans should be “actionable and list specific tasks, assign responsibilities, spell out the methods of assessing progress, and [include] cost estimates for at least near-term tasks.” Third, “the plan should include: “short- and long-term goals and implementation strategies based on transparent interactions”



involving all interested parties. Finally, a community's sustainability plan "should be tailored to its unique circumstances and based on a comprehensive assessment of existing conditions."

Methodology Due to wide variations in the experiences of SSAFE communities with sustainability planning and execution and inherent limitations in the types and extent of information that can be gathered through a written survey, the task force decided to conduct a series of three 1½ hour focus group (FG) discussions between October 2025 and February 2026. Each focus group included at least one (often two) key informants from each of three SSAFE communities. The key informants from the nine communities (see Appendix E) were selected based on the breadth of knowledge of sustainability activities and plans on their home campuses. Task force members were invited to join each of the three focus group sessions as silent observers, and many did.

The chair or another member of the task force was responsible for preparing a series of questions and follow-up probes to be used during each FG session. The discussion was divided into three major topics: accomplishment to date; current and pending sustainability initiatives; and remaining challenges. Participants in FG #2 and FG #3 were asked to prepare brief, advanced summaries of sustainability activities and plans at their respective campuses. These summaries were used by the moderator in preparing session questions and probes. The FG sessions were recorded, and key informants were asked to review and comment on a draft summary of the session. The sessions summaries incorporate revisions and elaborations suggested by key informants from the nine SSAFE communities. The summaries are available upon request by contacting SSAFE staff.

On four occasions between mid-April and late June task force members met online to reach agreement on the report's findings, conclusions, and recommendations. Drafts were exchanged, reviewed and edited via email between these meetings.

Organization This introductory chapter is followed by chapters summarizing the task force's findings and conclusions (Chapter 2), recommendations (Chapter 3), and promising practices identified during the study (Chapter 4). Readers of these chapters need to understand the distinction the task force drew between a "finding," a "conclusion," and a "recommendation." A finding is a fact-based statement emerging from an investigation or an analysis. In contrast, a conclusion is an inference drawn from a finding(s) and applied more broadly – in our case to participating as well as non-participating SSAFE chapters and potentially to other senior living communities. A recommendation is a proposed course of action which, we believe, SSAFE chapters and other senior living communities (SLCs) should consider in preparing and implementing their sustainability plans. We chose to base our findings on cross-cutting themes that emerged from the focus group discussions and use these themes to formulate our conclusions and recommendations. Each finding and conclusion in Chapter 2, therefore, is followed by a parallel recommendation in Chapter 3.



In recognition of the fact that sustainability planning is an evolving area of activity on SSAFE chapter campuses, Chapter 5 includes suggested follow-up activities SSAFE national may wish to undertake to keep its affiliated chapters and other SLCs abreast of ongoing developments. The task force emphasizes that these are suggestions not recommendations.



Chapter 2

Findings and Conclusions

Several common themes related to sustainability planning and implementation emerged from the focus group discussions held by the task force. While participating communities differed in size, location, governance structure, and sustainability priorities, participants identified recurring opportunities and challenges that may be relevant to other senior living communities.

Taken together, the findings suggest that sustainability planning in senior living communities is evolving from a collection of individual projects toward a more coordinated, data-driven, and collaborative effort. Participants identified several factors that appear to influence progress, including leadership support, financial resources, access to data and expertise, resident engagement, and external partnerships.

1. Status of Sustainability Planning

Finding #1

Interest in comprehensive sustainability planning appears to be growing among SSAFE chapters. Eight of the nine communities that participated in task force-sponsored focus groups are either preparing or considering comprehensive, multi-year sustainability plans. However, at the time of the study, none of the nine participating communities had a fully developed plan that included long-term goals, specific implementation strategies and priorities, assigned responsibilities, timelines, cost estimates, and measurable performance indicators.

Conclusion #1

Sustainability planning among SSAFE chapters is still in its early stages. Although many communities have undertaken waste reduction, energy conservation, environmental restoration, and other sustainability initiatives, these efforts usually are organized as individual projects. The focus group feedback suggests that communities increasingly recognize the need for comprehensive multi-year plans and are in the process of gathering the data and conducting analyses necessary to support the development of such plans.

2. Leadership Support and Governance

Finding #2

Focus group participants consistently identified executive leadership and governing board support as important factors in advancing sustainability planning and implementation efforts. Communities that reported active involvement by senior leaders appeared to make greater progress in developing and implementing sustainability initiatives. At the same time, eight of the nine participating SSAFE chapters reported that management is beginning to involve residents in sustainability planning and implementation.

Conclusion #2

Active involvement of the board and management is an important factor in launching and sustaining comprehensive sustainability initiatives. These efforts are more likely to advance when senior leaders provide visible support, allocate resources, and integrate sustainability into organizational priorities while creating meaningful opportunities for resident participation.

3. Financial Limits and Resident Input

Finding #3

Focus group participants consistently identified financial constraints and competing organizational priorities as factors that influence the pace of sustainability planning and implementation. Participants reported that residents often have limited, if any, involvement in management's decision-making regarding the priority assigned to sustainability-related initiatives in formulating the community's operating and capital budgets.

Conclusion #3

By establishing sustainability goals, the corporate board provides direction and builds support for community action. Greater management transparency and opportunities for resident input during the budget development process helps to build support and foster an understanding of the tradeoffs facing community leaders.



4. Data-Driven Decision Making

Finding #4

Focus group participants reported that gaps in available data often hinder sustainability planning, prioritization, and performance measurement. Participants singled out greenhouse gas emissions as an area where incomplete or unavailable data can make it difficult to evaluate alternatives and measure progress.

Conclusion #4

Reliable data is an important foundation for effective sustainability planning and decision-making. The focus groups suggest that gaps in available data can make it difficult for communities to evaluate alternatives, establish priorities, measure progress, and make informed, long-range spending decisions.

5. Use of Consultants

Finding #5

A growing number of SSAFE chapters are retaining outside consultants to gather and analyze data, evaluate alternatives, and support sustainability planning efforts. Focus group participants, however, reported that residents often have limited opportunities to help shape consultant studies and review preliminary findings and recommendations before management decides on a course of action.

Conclusion #5

A growing number of communities rely on outside consultants to provide technical expertise and analytical capacity that is not available internally. Advice from consultants is more effective and better understood when residents are informed and engaged throughout the process. Consultants also can propose projects tailored to a community's unique sustainability needs.

6. Forging Local Partnerships

Finding #6

Several SSAFE chapters have developed productive partnerships with nearby colleges and universities, nonprofit organizations, government agencies, utility firms, and other organizations. Focus group participants said these partnerships often provide access



to technical expertise, resources, volunteers, and grant opportunities that help communities advance sustainability initiatives that otherwise might not be possible.

Conclusion #6

Partnerships with colleges, universities, nonprofit organizations, government agencies, and other groups can help communities access expertise, make better use of available resources, and strengthen ties to the surrounding community.

7. Volunteer Engagement, Coordination, and Education

Finding #7

Sustainability initiatives in many senior living communities depend on a relatively small group of resident volunteers. Focus group participants reported ongoing challenges recruiting volunteers, filling key leadership positions, and sustaining participation over time. Participants also described limited opportunities for sustainability-related education and training and identified coordination among resident committees, staff members, and other stakeholders as an ongoing challenge.

Conclusion #7

Sustainability initiatives are more effective when communities invest in building organizational capacity. Recruiting and developing volunteer leaders, improving coordination among stakeholders, and expanding education and training opportunities are necessary to sustain momentum and broaden participation in sustainability efforts. Success ultimately depends not only on technical solutions and financial resources, but also on the people who carry out the work.

Chapter 3

Recommendations

The findings and conclusions in Chapter 2 provide the foundation for the recommendations in this chapter. Although every senior living community has to work within its own operational constraints, the focus group discussions identified several common practices that can help communities strengthen sustainability planning and implementation and build organizational capacity. Communities are encouraged to adapt these recommendations to their own circumstances, resources, and priorities.

1. Develop Comprehensive Sustainability Plans

Senior living communities should prepare written, multi-year sustainability plans that address a broad range of environmental, ecological, and climate-related issues. While every community's circumstances will differ, a comprehensive sustainability plan can help coordinate activities, establish priorities, allocate resources, and guide long-term decision-making. [N.B., Readers may find the S-plan framework document in Appendix D helpful in developing a comprehensive sustainability plan.]

To support effective implementation and accountability, sustainability plans should include long-term goals, near-term objectives and action strategies, assigned responsibilities, resource commitments, timelines, and measurable performance indicators. Sustainability plans also should be integrated with the community's multi-year strategic plan and other campus-wide master plans, equipment replacement cycles, and new construction and major renovation plans. Communities should also establish processes to regularly monitor progress and update their sustainability plans as conditions and priorities change.

2. Strengthen Leadership Support and Resident Participation

Senior living communities should actively engage residents, management, and governing boards in sustainability planning and implementation. While the methods used to achieve this goal will vary from community to community, successful initiatives typically depend on open communication, meaningful collaboration, and visible support from organizational leaders.

Communities should establish regular opportunities for residents, management, and board members to exchange information, discuss priorities, and participate in decision-making. Sustainability goals should be integrated into strategic planning and



organizational priority setting, with clear assignments of leadership responsibility and active oversight by the governing board.

3. Increase Transparency and Resident Input in Budgeting

Senior living communities should provide residents with meaningful opportunities to participate in discussions about sustainability-related components of operating and capital budgets. While budget decisions ultimately rest with management and the governing board, greater transparency and resident involvement can help build support for sustainability initiatives and improve resident understanding of financial constraints and competing priorities.

Communities should encourage ongoing dialogue between resident leaders and management throughout the budget development process. Resident committees can contribute by identifying priorities, providing supportive information, and helping communicate the benefits and tradeoffs associated with proposed investments in sustainability.

4. Build Stronger Data Systems

Senior living communities should develop systems to collect, manage, analyze, and report sustainability data. Reliable data helps communities establish priorities, evaluate alternatives, measure progress, and make informed spending decisions. Where practical, communities should use standardized metrics and reporting methods to facilitate benchmarking and comparisons of performance over time.

Communities should establish baseline measurements, maintain historical records, and regularly track key sustainability indicators, including energy use, greenhouse gas emissions, water consumption, waste generation, and transportation patterns. Sustainability data should guide planning and decision-making and be reported periodically to residents, management, and members of the governing board to support accountability and continuous improvement.

5. Engage Residents Throughout Consultant Studies

Senior living communities should actively engage residents throughout consultant-led sustainability studies and planning efforts. While management is responsible for selecting and overseeing the performance of consultants, resident involvement and buy-in can improve understanding of community priorities, strengthen support for sustainability initiatives and recommended actions, and enhance confidence in the planning process.



Communities should provide opportunities for residents to offer input when project goals and scopes of work are being developed, receive updates as studies progress, and review and discuss preliminary findings and recommendations before major decisions are made. Effective communication throughout the process can help ensure that consultant-led studies are both technically sound and broadly understood by the community.

6. Build Local Partnerships

Senior living communities should explore opportunities to collaborate with colleges and universities, nonprofit organizations, government agencies, utilities, and other community organizations. These partnerships can provide access to technical expertise, educational resources, volunteers, grant and funding opportunities, and other forms of support that may not be available within the community.

Communities should explore partnerships that advance their sustainability goals while strengthening connections with the surrounding community. Collaborative projects can help communities leverage limited resources, access funding opportunities, share knowledge, and accelerate progress toward sustainability objectives.

7. Build Organizational Capacity

Senior living communities should invest in the people, knowledge, and organizational structures needed to sustain long-term sustainability initiatives. Successful programs depend on more than technical expertise and financial resources. They also require informed participants, effective communication, and ongoing development of volunteer leaders.

Communities should promote awareness of sustainability goals and initiatives, provide education and training opportunities for residents, staff, and board members, and actively recruit and develop new volunteer leaders. Efforts should also be made to improve coordination among resident committees, staff members, and other stakeholders so that sustainability activities are properly aligned and mutually reinforcing.

Chapter 4

Promising Practices

The focus groups identified several promising practices that can help senior living communities strengthen sustainability planning and implementation. This chapter highlights those practices and illustrates how participating communities have addressed common sustainability challenges. Rather than serving as models to be copied exactly, these examples offer approaches that other communities can adapt to their own circumstances, resources, and priorities.

1. Building Action-Oriented Sustainability Plans

Collington has developed a project-based sustainability plan that incorporates several of our recommended accountability features. The community's annual budget includes funding and staff resources needed to move forward on all active projects. A core leadership team consisting of resident sustainability leaders, the CEO, CFO, Facilities Director, and horticulturist meets quarterly to review progress, address challenges, and coordinate implementation activities.

2. Creating Effective Resident-Management Partnerships

Kendal at Hanover has established a collaborative working group, WEST (Working on Environmental Sustainability Together), to advance the community's sustainability goals. The group includes residents, staff members, and outside experts and is chaired by KoH's Chief Operating Officer. At the time of the task force study, WEST was focused on implementing recommendations from a comprehensive campus-wide energy audit completed in 2024. By bringing together residents, senior managers, and technical experts, the group provides a structured forum for collaboration, problem-solving, and oversight of sustainability initiatives.

3. Integrating Long-Term Planning and Implementation

RoseVilla's resiliency planning process illustrates the benefits of taking a long-term approach to major sustainability and resilience investments. The community adopted a twenty-five-year implementation horizon that allows large capital projects to be phased in over time while making progress on near-term priorities. RoseVilla is currently building on this foundation by developing a companion sustainability plan that uses many of the same data-collection and planning resources. This approach demonstrates how communities can coordinate related planning efforts and spread investments over a longer time horizon.



4. Data-Driven Decision Making

RiverWoods is working with the University of New Hampshire to collect and analyze utility consumption and cost data across its three communities. The data is being entered into the university's SIMAP carbon accounting system, providing a consistent framework for tracking greenhouse gas emissions and measuring progress over time. By establishing a baseline and using a standardized reporting system, RiverWoods is creating the information needed to evaluate alternatives, set priorities, and monitor the effectiveness of sustainability initiatives.

5. Use of Consultants

At **Kendal at Hanover**, resident leaders participated in selecting an outside consultant to conduct a comprehensive campus-wide energy audit. Following completion of the audit, residents continued their involvement as members of the WEST committee, helping oversee implementation of the consultant's recommendations. This approach ensured that residents had a voice in both shaping the consultant engagement and guiding follow-through on the resulting sustainability initiatives.

6. Forging Local Partnerships

For many years, **Kendal at Oberlin** has partnered with Oberlin College and the City of Oberlin to reduce carbon emissions and create a sustainable environment. As a result of their combined efforts, the city is widely recognized as one of the most environmentally sustainable jurisdictions in the U.S.

Piper Shores participates in a sustainability collaborative that includes the Town of Scarborough, Maine. Formed in 2020 to improve areawide sustainability initiatives, a subgroup of the collaborative, called the Sustainability Interest Group, is currently working on a plan to implement the goals and strategies contained in a consultant report commissioned by Piper Shores last year.

7. Volunteer Engagement, Coordination, and Education

The Environmental Sustainability Group at **Collington** has established an environmental film series and uses these events to encourage attendees to become involved in the work of related resident committees. Collington also hosts presentations by outside experts on environmental topics and recently announced a twelve-part lecture series focused on environmental restoration of the Chesapeake Bay watershed.



Chapter 5

Suggested SSAFE Follow-up Activities

Because sustainability planning will continue to evolve long after the task force files its report, we offer the following suggestions regarding activities SSAFE National may wish to consider. These are offered as suggestions not recommendations. Responsibility for deciding which of these suggestions should be pursued, and in which order, rests with the SSAFE Board of Directors, in consultation with the Executive Director, after considering other organizational priorities and the resources available at the time.

1. SSAFE should consider periodically asking each chapter to prepare a brief, two-page progress report on the status of its sustainability planning and implementation efforts.

These reports should briefly summarize the status of sustainability planning and implementation activities as well as remaining obstacles to completing and implementing the chapter's plan. Chapter reports should be submitted annually, compiled by the SSAFE staff, and shared with leaders of all SSAFE chapters. Each chapter report should include the name and contact information of a resident(s) who is willing to respond to inquiries from residents and staff at other SSAFE-affiliated communities.

We believe the preparation and distribution of annual summary reports would allow chapter leaders to keep abreast of developments and collaborate with their peers at other SSAFE communities that have faced or are facing analogous situations. The task force used a similar approach in organizing the focus groups. Key informants from each SSAFE chapter were asked to submit a summary report in advance. We found that access to the summaries resulted in more informative focus group discussions.

2. SSAFE should consider establishing a separate Sustainability Planning Work Group rather than continuing to treat sustainability as a sub-activity of the Energy Work Group.

The task force was created in response to Goal III of SSAFE's five-year strategic plan (see Appendix A) but organizationally it has functioned as an activity of the Energy Work Group. In keeping with the task force's recommendation that SSAFE chapters adopt comprehensive plans that encompass a wide range of sustainability activities (see Chapter 3, Recommendation #1), SSAFE should consider establishing a separate



work group on sustainability planning. This action would underscore the need for a synchronized approach to planning and implementation as recommended by the task force. It would also reinforce SSAFE's commitment to bridging the divide that has often separated campus advocates of energy-related, environmental, and ecological initiatives. Finally, the creation of a sustainability planning work group would be consistent with recent efforts to organize work groups on climate-friendly dining, reducing plastic and other waste products, and landscaping and biodiversity management.

3. Incorporate the task force's findings, conclusions, and recommendations in SSAFE's Pathway to Net Zero.

The Pathway is described on the SSAFE website as "a practical guide to help senior living communities reduce greenhouse gas emissions and move toward a sustainable future." Sustainability planning and execution play a central role in achieving net zero emissions and, consequently, the task force's findings, conclusions and recommendations should be incorporated in the Pathway framework.

4. Prepare and post on the SSAFE website short videos that highlight key task force findings and conclusions.

The task force's final report should be posted on the website and shared as a PDF file with chapter leaders. Experience, however, indicates that only a small fraction of website visitors will elect to download and read the full report. Short videos have proven to be an effective way of reaching a wider audience that includes individuals interested in learning about sustainability planning, but who are unlikely to read a text heavy report. The videos, for example, might feature resident and staff leaders discussing steps that have been taken to: (a) gather and analyze data that forms the basis of the chapter's comprehensive multi-year sustainability plan; and (b) forge closer working relations between residents and management in formulating and implementing the plan. The "talking heads" portion of the video might be interspersed with campus footage illustrating the progress achieved to date.



Goal III:

SSAFE Five-Year Strategic Plan

GOAL III. Foster <u>collaboration between residents and management</u> at SSAFE Communities	
OBJECTIVE 4	SSAFE identifies best practices for how residents can interact effectively with management
	10. Interview or survey resident leaders of current and past environmental sustainability Projects to identify the forces that ease or block the success of projects
	11. Compile and disseminate “Pathways to Better Resident/Management Collaboration” that leverages best practices for promoting and implementing joint environmental sustainability efforts
OBJECTIVE 5	SSAFE offers guidance on developing and implementing comprehensive plans to address climate change
	12. Develop and promote the rationale for master plans aimed at improving GHG emissions And environmental sustainability at SSAFE Communities
	13. Gather and disseminate examples of environmental sustainability plans (budgeted or implemented) from SSAFE chapters
	14. Develop and conduct training on how to develop a comprehensive, multi-year GHG reduction and environmental sustainability plan
	15. Develop materials aimed at management that demonstrate the financial and promotional value of moving to reduce greenhouse gas (GHG) emissions
	16. Develop “Pathways to Funding Environmental Sustainability Projects” for chapter use
	17. Conduct chapter visits by SSAFE leadership to meet with resident leadership and decision-makers



Members of the SSAFE Sustainability Planning Task Force

Robert Gettings	Task Force Chair, Kendal at Lexington
Steve Woodbury	Collington, A Kendal Affiliate
Bob Foley	Kendal at Crosslands Communities
Steven Fellows	RiverWoods Durham
Ed Gellenbeck	RoseVilla Senior Living
Jim Wick	Wake Robin



Related SSAFE Resources

The SSAFE Pathway to Net Zero is a practical roadmap to help senior living communities reduce greenhouse gas emissions and move toward a sustainable future.

<https://ssafe.org/pathway/>

SSAFE's Energy/Greenhouse Gas (GHG) Emissions Reduction Audit Request for Proposal (RFP) Template is a customizable resource designed to help senior living communities identify qualified contractors to conduct comprehensive campus-wide energy and GHG emissions reduction audits. <https://ssafe.org/rfp/>

The SSAFE Unit Turnover Guide identifies important elements of a cottage/apartment turnover plan as it impacts energy efficiency. This Guide is intended to help residential retirement communities create written unit turnover protocols and plans that reflect the unique features of different types of residential units on campus.

<https://ssafe.org/turnover/>

The SSAFE Green Building Certifications Review and Matrix, developed by the SSAFE Energy Workgroup, provides a starting point for residential retirement communities seeking to select a green building certification program. The review covers 9 widely used programs in North America and includes a matrix comparing fee structures and requirements, along with brief narratives highlighting special features of each certification program. <https://ssafe.org/green-building-certifications/>



Definition and Key Components of a Sustainability Plan

What is an Environmental Sustainability Plan?

An environmental sustainability plan is a strategic document, supported by the organization's management, that outlines how a community will operate over the long term in a sustainable and economically viable manner, with a primary focus on reducing its environmental impact and addressing the effects of climate change.

Each community's Sustainability Plan should be tailored to its unique circumstances and based on a comprehensive assessment of existing conditions. This may include calculating the community's carbon footprint and evaluating energy use, water consumption, waste management, transportation systems, energy conservation, greenhouse gas (GHG) reduction, purchasing practices, land use, and climatic resiliency.

The plan components listed below are intended to be suggestive, not prescriptive. Not all topics need to be addressed to produce a worthwhile plan. An initial plan could focus on the most important areas first. Other elements could be addressed later.

Plans should be actionable and list specific tasks, establish timelines, assign responsibilities, spell out methods of assessing progress, and estimate costs for at least near-term tasks. In addition, the plan should include: 1) short- and long-term goals, and 2) implementation strategies based on transparent interactions among board members, residents, all levels of staff, and governmental and non-governmental groups in the local community.

The Role of Senior Stewards Acting for the Environment

SSAFE's mission and organizational focus is on environmental actions designed to reduce contributions to climate change and preserve the natural environment. The purpose of this document is to highlight the environmental planning and execution aspects of a senior living community's efforts to combat global warming and promote a sustainable living environment. We recognize that there are many other critical aspects of operating an effective senior living community, including promoting the health and wellness and social engagement of community residents, recruiting and retaining qualified staff, and employing sound financial management practices.



Key Components of a Senior Living Community's Environmental Sustainability Plan

1. **Energy Efficiency and Greenhouse Gas Reduction:** Identify energy/emissions reduction measures (ERMs) that will be necessary to eliminate or greatly reduce the community's carbon footprint. Retrofit buildings where possible for lower energy use. A tabulation of the probable effect of different ERMs and the total potential reduction in the carbon footprint is desirable. A rough estimate of probable costs is also desirable if it can be obtained. An energy audit is often a part of this effort. Consider the adoption of LEED, ENERGY STAR, or other sustainable building certifications for new construction and major renovations.
2. **Land Use and Habitat:** Support biodiversity and reduce GHG emissions by using native plants, restoring natural landscapes, removing invasive species, conserving open space, creating pollinator gardens, adapting to changes in climatic conditions. and transitioning to electric landscaping equipment.
3. **Sustainable Purchasing:** Emphasize the procurement of goods and services with a lower carbon footprint such as low-carbon food and building materials that reduce environmental impact and minimize GHG emissions.
4. **Sustainable Transportation:** Encourage transition to electric vehicles for community operations, install EV charging stations (Level 1–3), and explore shared transportation models that reduce vehicle use and emissions.
5. **Waste Reduction:** Promote recycling, reuse, re-purposing, composting, and responsible procurement practices.
6. **Water Conservation:** Identify measures to reduce water usage and improve management of stormwater runoff.

A senior living community also should have a climate resiliency plan that includes measures to maintain safe living conditions during disruptions to utilities and major services. The plan may be a component of, or separate from, the community's sustainability plan and include an assessment of climate-related risks such as extreme heat, storms, wildfires, and power outages.

Plan Implementation Factors

1. **Community Engagement:** Create opportunities for residents to participate in meaningful ways in the preparation and implementation of the community's



environmental sustainability plan.

2. **Collaboration:** Maintain open, transparent communications among residents, board members, and staff throughout the planning and execution process, including regular progress reports and discussions among all interested parties.
3. **Performance Metrics:** Track progress through key performance indicators such as energy use per resident, waste diversion rates, or resident satisfaction.
4. **Continuous Improvement:** Periodically review and update the community's environmental sustainability plan to reflect new technologies, laws, regulations, resident needs or other considerations.



Focus Group

Key Informants by Chapter

Focus Group One: October 17, 2025

Scot Drysdale	Kendal at Hanover
Stuart White	Kendal at Hanover
Dorothy Luciano	Kendal at Oberlin
Larry Litten	Piper Shores
Jean Smith	Piper Shores

Focus Group Two: December 09, 2025

Joel Brody	Collington, A Kendal Affiliate
Steven Woodbury	Collington, A Kendal Affiliate
Ed Gellenbeck	RoseVilla Senior Living
Jean Lofy	RoseVilla Senior Living
David Smith	Wake Robin

Focus Group Three: February 10, 2026

Bob Foley	Kendal at Crosslands Communities
Merle Tanis	Kendal at Crosslands Communities (Cartmel)
Anonymous	RiverWoods Durham
Charlotte Hitchcock	RiverWoods Durham
Jane Comstock	Kendal at Lexington
Bob Gettings	Kendal at Lexington

