

Greater Harleysville and North Penn Senior Services Strategic Plan 2014-2016



This strategic plan was created after the merger of The PEAK Center into Encore Experiences at Harleysville. Past strategic plans from both organizations were reviewed, community conversations were held, and the following focused goals and action plan was created. This is a living document and will be reviewed and revised throughout the intended time period as needed.

Mission:

The mission of Greater Harleysville and North Penn Senior Services is to provide access to programs and resources that help older adults live independently and remain active.

We accomplish our mission by providing: Social Service, Information, and Assistance; Special of the Day (Congregate) Meal Program; Health and Wellness Programming; Life Long Learning Programs; and Volunteer Opportunities.

Organizational Background Information

Greater Harleysville and North Penn Senior Services (GHNPSS) is the new name chosen to reflect the larger geographical area served as a result of the merger of The PEAK Center into Encore Experiences at Harleysville.

Encore Experiences at Harleysville and The PEAK Center were each private non-profit agencies established in 1975 and 1974 respectively, to promote the well-being of senior citizens age 55 and older. As a combined organization it is our goal to standardize the level of services offered to older adults over a larger region.

In December of 2012, The PEAK Center moved from its long term home on Main Street in Lansdale to subletting space in the Advanced Living property known as Schwenckfeld Manor. This move has allowed us to function more efficiently while maintaining services to the community. The Main Street property needed constant maintenance, and the building had multiple levels limiting access to some programs and staff for our participants. In addition to our internal struggles with the building the Borough of Lansdale installed metered parking downtown and parking meters convenient to our location increased in costs to \$1 an hour. At our temporary location although limited on space, we are offering almost all the programs we offered in the past. We are located all on one level and the parking is plentiful and free.

Encore Experiences has remained in the same location since 1981. Many upgrades have been made to that location to keep the organization welcoming and inclusive to the community including new lighting, new heating, and kitchen renovations.

Each organization brought unique strengths and expertise to this merger.

In 2012 Encore Experiences was named "Research Partner" by the TCC Group to develop a product that measures senior center program outcomes and recommends program changes to improve those outcomes.

The meal program at Encore Experiences has been recognized as a model for removing barriers to participation and offering the congregate meal in an atmosphere of dignity and respect, with no advanced registration required, and meal choices offered.

In February 2010, Encore Experiences became accredited by the National Institute of Senior Centers. The PEAK Center was one of the first senior centers in the country to become accredited.

The PEAK Center brought with it a partnership in the collaboration to create North Penn Commons (NPC). NPC is collaboration between the senior center, Manna on Main St (the area food pantry), the North Penn YMCA, and Advanced Living. The construction of North Penn Commons has already begun with improvements to the YMCA building and soon to begin land development to benefit the entire project. We anticipate moving The PEAK Center in the new North Penn Commons building in summer of 2015.

Strategic Planning Process

A strategic planning meeting/retreat was held on May 15, 2014, with the assistance of consultants from the RSVP (Retired Senior Volunteer Program) VEC (Volunteer Executive Consultants) Jane Forth, Dr. Harvey Hoffman, and Richard Woodville.

In attendance were: Robin Burstein, Executive Director; Kay Pagni and Jenny Metzger, Assistant Directors Encore/PEAK; Linda Bean and Louise Shaheen, Member Representatives to the Board Encore/PEAK; Anna Crouse, Dan McKee, Mary Metz, and Deb Santoro, Board Members. Two others were invited to attend and sent comments for review: Russell Johnson, CEO North Penn Community Health Foundation; and Kim Licata, Former Board Member and Immediate Past President.

At that meeting we reviewed the goals and objectives of both Encore Experiences and The PEAK Center past strategic plans and completed a full SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis. These were then organized under four overarching categories. This information was then discussed in several arenas: Staff Meetings, Members Meetings, and Board Meetings, to determine if there were any significant issues missing and to prioritize goals and objectives.

The draft plan was then presented to the board of directors and approved on July 10, 2014.

Goals of new strategic plan 2014 - 2016

1. Melding Cultures

Although the merger has proceeded very smoothly, there are still areas where we can fall into past culture and practices. The staff and participant/members have adjusted well, but due to the commitment to retain separate locations, there is often still an “us/them” culture. We have reviewed and applied some best practice operations and procedures from each location to both locations; however there remains a significant amount of procedures that are different. There is programmatic overlap that exists and some duplication of work in researching/planning programs and timing of events.

2. Outreach

Marketing efforts have been adjusted to represent both locations. The newsletters have remained separate for each location. Educating the community about our programs and services is always a top priority, however the budget does not allow for much general advertisement unless we receive a grant or are advertising a specific grant related service.

Partnerships with local companies and funders tends to be a one-way street. They offer volunteers and or provide financial support. What can we offer them to provide value to their employees/constituents while building our relationship with the company and spreading the word about our programs and services?

3. Programs & Evaluation

Encore Experiences participated in a “Becoming a Learning Organization” project in 2011-2012 in partnership with GENERATIONS of Indian Valley. We learned about our programs and the outcomes they produced for participants. There were plans to continue to work with that consultant to develop modules for senior center evaluations and offer the modules across the country, but those plans never materialized. We find ourselves again completing evaluations as requested by funders and have not created evaluation procedures for the organization that not only provide the funders the information they request, but also to give us information on how to improve programs and services and as an organization.

4. Financial Stability

There is always uncertainty of funding and government support continues to come with increased regulations. We will always be grateful for the government and community support we receive, but it is imperative we look to create new revenue opportunities.

5. North Penn Commons

The PEAK Center brought with it a partnership in the collaboration to create North Penn Commons (NPC). NPC is collaboration between the senior center, Manna on Main St (the area food pantry), the North Penn YMCA, and Advanced Living. We anticipate moving The PEAK Center in the new North Penn

Commons building in summer of 2015. This is not simply a shared location, rather a building in which all organizations will share resources to benefit all who participate at any of the partners organizations. We need work collaboratively with our partners in the development and construction process and to continuously look for shared resource opportunities and adapt to each other's needs as we build and reside on common ground as a part of this campus.

Strategic Plan 2014 - 2016

Goals and Objectives Assignments and Timelines

1. Melding cultures of both locations

- a. Operations
- b. Board Development
- c. Staffing
- d. Volunteers

Objective Ensure day to day forms and procedures utilized at each location are the same.				
Measurement Create lists of all forms and daily reporting procedures and ensure all have been reviewed for best practice procedure to be implemented.				
Action Items	Responsible	Timeframe	Notes	Status
1. Review of MySeniorCenter Data Base set up. Update data entry screens.	Administrative Assistants	Q3 2014		Started
2. Review of all hard copy forms to ensure same are being used at each location. Update for both locations where needed.	Administrative Assistants	Q3 2014		Started
3. Update operating manual to include procedures for each location.	All Staff	Semi Annual Ongoing		Currently Up to Date

Objective Develop Board based on annual board evaluations.				
Measurement Review progress of board assessments. Ensure any areas of weakness are addressed. Target new members based on skills needed on the board.				
Action Items	Responsible	Timeframe	Notes	Status
1. Annual Board Group and Self Assessments.	Executive Director/Board	May/June Annually		Done 5/2014
2. Based on assessments target areas of need: i.e.:	Executive Director/Board	Monthly		Ongoing
a. Review of progress against strategic plan goals.	Executive Director/Board	Annually (June)		
b. Include more board members in annual review of executive director.	Executive Director/Board	Ongoing		IT/Marketing
3. Target specific community members to join the board based on skill areas needed.				

Objective Consolidate and structure staffs to support all programming and operations.				
Measurement Enough depth of staff to cover unanticipated time off/out of office. Training and cross training of appropriate staff.				
Action Items	Responsible	Timeframe	Notes	Status
1. Review of staffing structure. Roles and needs, overlap, and potential efficiencies to put into place.	Executive Director/Staff	Annually (June)		Done 6/2014
2. Improve communications between like positions at each location to accommodate depth of programming, eliminate duplication, and ensure appropriate division of workloads.	Executive Director/Staff	Ongoing		Started
3. Develop system for ensuring adequate room space and parking is available for programs offered.	Program Staff	Q4 2014		
4. Ensure all staff are offered additional training opportunities.	Executive Director	Ongoing		Started

Objective Develop volunteer teams as needed to enhance programs and further our mission.				
Measurement Clearly define positions, and roles. Track volunteer hours and opportunities listings in the MySeniorCenter data base.				
Action Items	Responsible	Timeframe	Notes	Status
1. Review volunteer needs of the organization. Ensure people are available to meet current needs and run each location efficiently.	Administrative Assistants	Q1 2015		
2. Research additional volunteer opportunities and projects, i.e.: people helping people with odd jobs, expertise, at home, opportunities at NPC.	Administrative Assistants	Q2 2015		
3. Strengthen volunteer program by stressing the health benefits of volunteering	Program Staff	Q1 2015		
4. Encourage volunteerism outside of senior center walls.	Program Staff	Q3 2015		

2. Outreach

- a. Marketing (Internal)
- b. Marketing (External)
- c. Partnerships

Objective Ensure internal marketing materials convey programs/services at each location.				
Measurement Numbers of people receiving newsletters, opening constant contacts, and responding to flyers and other internal marketing efforts.				
Action Items	Responsible	Timeframe	Notes	Status
1. Review all marketing materials for opportunities to build brand of larger organization with two locations to serve the community.	Communications Manager	Ongoing		Started
2. Create combined marketing materials where and when appropriate, i.e.: tri-fold, brochures, newsletters, constant contacts, other...	Communications Manager	Q3 2014/Ongoing		Trifold: Done Brochures: Done Constant Contact: Done
3. Staff aware of and trained to answer questions about programs/services offered at either location.	Administrative Assistants/Program Staff	Q3 2014/Ongoing		

Objective Ensure external marketing materials remove the stigma of traditional senior centers and convey programs/services at each location, to attract new participants.				
Measurement New participants joining us for programs/services.				
Action Items	Responsible	Timeframe	Notes	Status
1. Create calendar of press release opportunities and send regular press releases to media outlets. i.e.: May is Older Americans Month, September is Senior Center Month.	Communications Manager	Q1 2015		
2. Stay aware of current events and their effects on older adults. Prepare press releases and send in timely manner to media outlets.	Communications Manager/All Staff	Ongoing		
3. Send flyers/promotional materials to all partners for posting of programs/services as appropriate.	Communications Manager	Ongoing	Systems are in place	Ongoing
4. Update Website to reflect new organization with two locations	Communications Manager	Q1 2015		Searching for Funding

Objective Ensure appropriate partnerships are in place to meet the needs of older adults.				
Measurement Listing of partnerships, define how they are utilized and measure how often they are utilized.				
Action Items	Responsible	Timeframe	Notes	Status
1. List all partnerships and review for overlap or missed opportunities.	Executive Director/All Staff	Q1 2015		
2. Reach out to additional potential partners to add additional programs/services.	Executive Director/All Staff	Ongoing		
3. Request data/ information on use and provide information to our partners regularly.	Executive Director/All Staff	Ongoing		
4. Explore two way partnerships with business community, not only receiving of funds, in-kind and volunteer services, but what programs/services can we offer them?	Executive Director	Q2 2015		
5. Continue to partner on community projects that meet the needs of older adults i.e.: Volunteer Driver Program, Walkable Communities Initiative, and North Penn Commons.	Executive Director	Determined by specific partnership		These projects already in progress

3. Programs & Evaluation

<p>Objective Evaluate regularly to ensure we are meeting the needs of the changing older adult demographic.</p>				
<p>Measurement Annual evaluation on all program/service areas and outcomes.</p>				
<p>Action Items</p> <ol style="list-style-type: none"> 1. Improve evaluation processes, procedures, and analysis. 2. Use data from evaluation process to ensure programs meet the needs of changing elder demographic, and participants are achieving the desired outcomes. 3. Ensure programs proven to be successful continue and become institutionalized within the organization, i.e.: Benefits Screenings, Tai Chi. 4. Evaluate programs not reaching anticipated levels of success/outcomes to establish value and make improvements or discontinue as determined. 5. Stay aware of trends and interests to test new programs that address issues within organization, meet the interests of younger seniors, and/or address community needs i.e.: 	<p>Responsible</p> <p>Executive Director/Committee</p> <p>Executive Director/Staff</p> <p>All Staff</p> <p>All Staff</p> <p>All Staff</p>	<p>Timeframe</p> <p>Q3 2014</p> <p>Q3 2015</p> <p>Ongoing</p> <p>Q3 2015</p> <p>Ongoing</p>	<p>Notes</p> <p>Procedures adapted by committee June 2014. May need to be adapted with changing organization/funder needs</p>	<p>Status</p> <p>New evaluation forms will be used May of each year.</p> <p>Benefits Screenings have become part of SS job description.</p>

<p>Bullying, Benefits Screening, Yoga.</p> <p>6. Publish evaluation metrics into reader-friendly formats for staff and board use, newsletter publication, and funder information.</p>	<p>Executive Director/Communications Manager</p>	<p>Q3 each year</p>		
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4. Financial Stability

Objective				
To obtain adequate funding to ensure uninterrupted offering of programs/services, and to have the financial strength to grow programs to meet changing needs				
Measurement				
Budgeted income and expenses to actual.				
Action Items	Responsible	Timeframe	Notes	Status
1. Review pricing structure of current income streams. i.e.: Newsletter Advertisements, Memberships, Special Event Ads and Sponsorships, Program Fees, etc...	Executive Director/Board	Q3 2014		
2. Review funding sources and ensure strong partnerships with current funders are maintained.	Executive Director	Ongoing		
3. Create system to maintain/improve relationships with individuals in community to enhance giving at higher levels (create major donor program)	Executive Director/Board	Q4 2014		
4. Research new grant opportunities and create new relationships that will result in program funding.	Executive Director	Ongoing		Ongoing
5. Promote and grow the planned giving program.	Executive Director/Board	Q1 2015		
		Q2 2015		
				Conversations

6. Explore earned income opportunities.				Started with Senior Care Agencies
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5. North Penn Commons

Objective				
To ensure a smooth transition leading to the move of The PEAK Center operations into NPC in the Fall of 2015.				
Measurement				
Project completion by target date. Number of MOU's and resource sharing projects in which The PEAK Center is a partner.				
Action Items	Responsible	Timeframe	Notes	Status
1. Work with Campaign Team(s) to ensure the campaign reaches targeted goals.	Executive Director/Board	Complete Q2 2015		Ongoing
2. Work with CEO Council to: <ul style="list-style-type: none"> a. Promote NPC to the community b. Create and adapt MOU's for shared resources and programs. c. Ensure ongoing communication between all partners 	Executive Director	Ongoing		Ongoing
3. Inform/educate participants on progress including: <ul style="list-style-type: none"> a. Construction b. Campaign c. Other 	Executive Director	Ongoing		Commons Corner started at the PEAK Center and to be added to our Newsletter 9/10/2014
4. Work with developer and architects to ensure space adequately meets our needs.	Executive Director/Board	Complete Q2 2015		Ongoing