

Golden Age Centers of Greater Cleveland



Strategic Plan 2006 – 2010

April 2006

Table of Contents

Strategic Planning Committee.....	3
Overview of Golden Age Centers of Greater Cleveland	4
Overview of Strategic Planning Process.....	5
Mission & Values	7
Goals & Strategies	8
Clients.....	9
Programs & Services	10
Fundraising	13
Human Resources	15
Governance.....	17
Conclusion.....	18
Glossary of Strategic Planning Terms.....	19

Strategic Planning Committee

Craig White, Committee Chair

Paul Alandt

Gary Brahler

Thomas Brick

Christopher Cameron

Colleen Carpenter

Michael Dolan

Robert Faxon

Zev Harel

Maggie Jackson

Barbara Janovitz

Chuck Johns

Bracy Lewis

Dynette Martin

Joan McCarthy

Frank Novak

Fatima Perkins

Joseph Teague

Linda Racut, Administrative Support

Consulting Team

James Armour

Jason Byerlotzer

Andrea McDonald

Kiley Zulauf

Overview of Golden Age Centers of Greater Cleveland

The Golden Age Center of Cleveland was established in 1954 as an initiative of the Welfare Federation, the Benjamin Rose Institute and the Cuyahoga Metropolitan Housing Authority. The purposes of the corporation were outlined in the incorporation documents:

1. To provide one or more social centers where older men and women may come for companionship and recreation, for the practice of arts and crafts, and for consultation or referral to other agencies.
2. To encourage classes and activities that will aid men and women to prepare for the period of their retirement, to the end that this period of leisure will be satisfying and fruitful for them.
3. To provide a setting where students can learn to work with older people to discover their needs and the means by which such needs can be met.
4. To encourage research regarding the relationship between group work, recreation and the health of older people.
5. To cooperate with other social agencies in the promotion of the well-being of older people and to support such community programs as will help older people lead independent and useful lives.

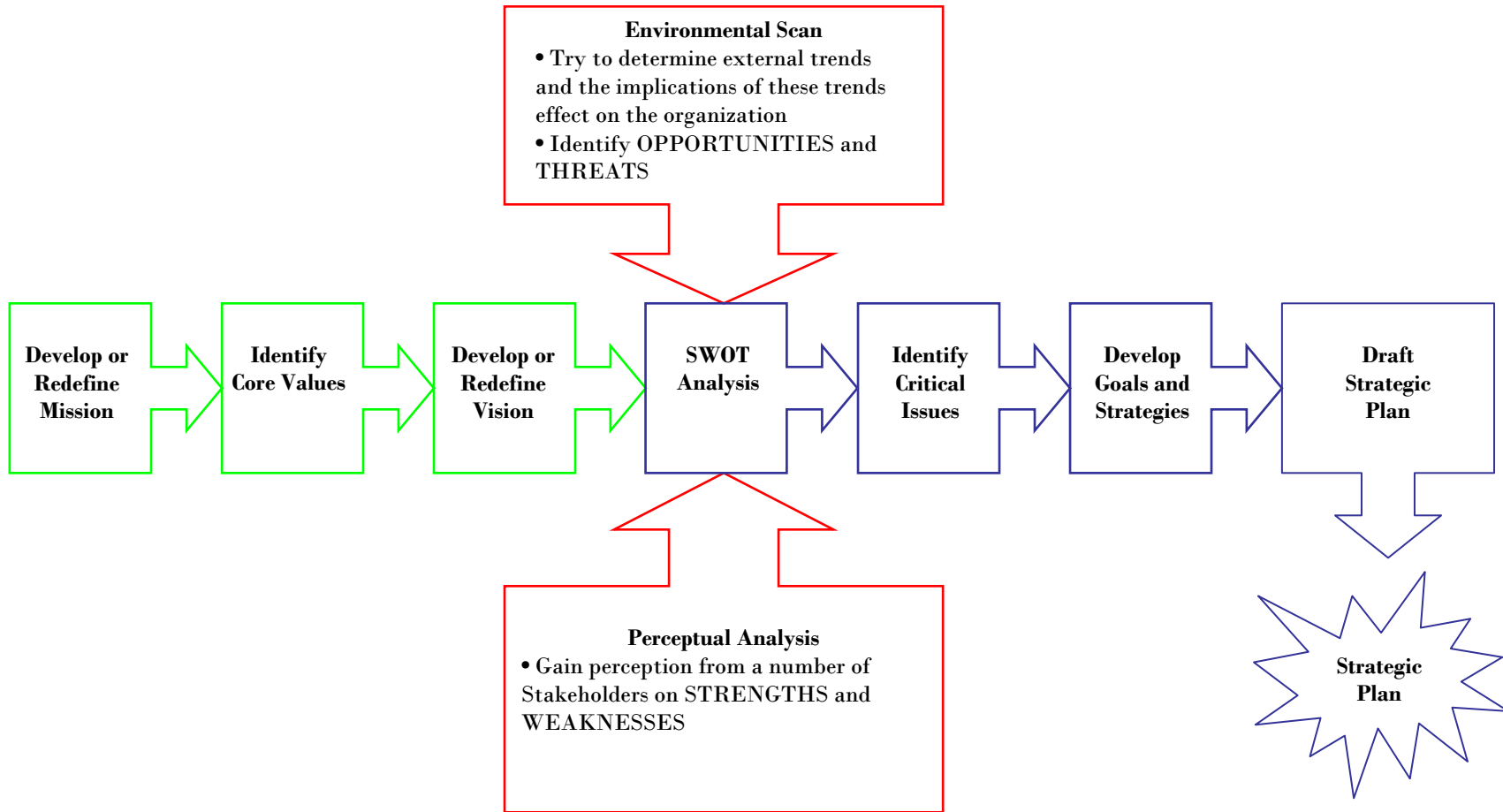
The Lucia J. Bing Center was opened one year later in the Cedar Apartments for the Elderly located on East 30th and Cedar Avenues. Today, the Golden Age Centers of Greater Cleveland, Inc. operates four community centers for older persons, eight centers for older persons residing in buildings with supportive housing, and a county-wide home delivered meal program.

The emergence of a new generation of older persons requires new approaches to carrying out our fifty year old mission. It is six years since GAC went through a formal strategic planning process. The strategic plan we develop in 2006 is in response to the ordinary business needs of any well run agency. More importantly, this strategic plan is being developed at a time when significant changes are occurring in the issues facing retirees. In fact the notion of retirement is changing dramatically, and the definition of old age is changing as well. Improved medical care is reducing the early incidence of frailty and disability. Economic factors are contributing to new definitions of retirement that can be a period blending work, education, volunteering, exploration and leisure.

It is during this period of dramatic change in how Americans age that GAC seeks to find its roll in contributing to the independence and well being of older Americans.

Overview of Strategic Planning Process

- The process began during summer 2005, with the initial request for proposal to the Mandel Center. Upon being accepted to participate in the process, Golden Age Centers was paired with a Mandel Consulting team, which would assist in the facilitation of the strategic planning process.
- In September 2005, the committee chair, president, and board chair met the Mandel team for the planning-to-plan meeting, which clarified each group's roles and responsibilities and laid out a framework for the year-long process. (See page 6)
- From that point forward, the Mandel consulting team completed an in-depth analysis of the internal dynamics of the organization and the external environment. Internal research involved focus groups and/or one-on-one interviews with clients, funders, staff, and board members. In order to assess the external business environment and identify important industry trends, we utilized library resources and databases available through Case Western Reserve University. The environmental scan and perceptual analysis were presented to the formal strategic planning committee in November 2005.
- During the November 2005 fall retreat the Strategic Planning Committee convened in full for the first time. At this meeting, the consulting team presented the results of the environmental scan and perceptual analysis and facilitated discussion of the Golden Age Center's mission, vision, and values.
- In February 2006, we conducted a day-long retreat to pinpoint the strengths, weaknesses, opportunities and threats (SWOT) facing GAC. Upon completion of the SWOT analysis, we identified the critical issues that should be addressed in the strategic plan.
- The committee met again at the end of February to develop goals and strategies to address the critical issues we identified at the prior meeting.
- The consulting team composed a draft of the goals and strategies for the strategic plan, which was presented to the board April 2006.



Mission and Values

Mission

To provide outstanding programs and supportive services that enhance the quality of life and independence of older persons.



GAC Values

We value the gift of extended life as an opportunity to explore, not a problem to solve.

We value the mature wisdom of old age as a treasure to share with future generations.

We value the experience of long life as a resource to add to a dynamic national economy.

We value the luxury of time in retirement to explore untapped creativity.

We value the privilege of being family to those left alone.

Goals & Strategies

The goals and strategies that follow were developed with broad consultation and extensive research and are intended to provide operational direction for Golden Age Centers of Greater Cleveland. Each matrix is designed to easily access necessary information regarding the goal, strategy, action step, and reoccurring discussions. Columns for responsibility and timeframe are intentionally left blank; these can be filled in as the strategic plan is converted into a tactical plan for day-to-day operations.

Important considerations:

- Who will be the driver of this plan? Consider the importance of a partnership between staff and board members when implementing the strategic plan. There must be buy-in at all levels in order for the plan to be successful. You may also choose to designate a “champion,” who is responsible for driving the adoption.
- As this plan is converted into an operational document, it may be useful to add additional columns to the matrix. These can include but are not limited to: measurement, costs, status/monitoring comments, etc.
- Assess current staff responsibilities and time commitments prior to assigning additional tasks related to the action steps outlined below.
- Due to the constant changes in the external environment it is crucial that the plan be revisited on a regular basis.
- This document is a *strategic* plan. It is the responsibility of the Golden Age Centers of Greater Cleveland to transform this strategic plan into an *operational* document for implementation.

Goal 1: Identify current and target participants

Clients	Strategy	Action Steps	Reoccurring Discussion	Responsibility	Timeframe
	1. Identify and categorize current participants in all locations	<ul style="list-style-type: none"> Form task force, consisting of CEO, 2 center directors, 3 board members 			
	2. Determine needs of current participants		<ul style="list-style-type: none"> Consider needs of frail elderly, as well as baby boomers Consider needs of economically disadvantaged and those with discretionary income 		
	3. Develop profile of “target” participants	<ul style="list-style-type: none"> Compare current and “target” participant characteristics 	<ul style="list-style-type: none"> Consider difference between supportive housing centers and community centers What are those differences? 		
	4. Build marketing plan to attract target constituency	<ul style="list-style-type: none"> Assess current marketing efforts Draft plan, based on needs assessment 			

Goal 2: Develop programs based on the needs of current and target participants

Programs & Services	Strategy	Action Steps	Reoccurring Discussion	Responsibility	Timeframe
	1. Evaluate current program models	<ul style="list-style-type: none"> • Develop task force of CEO, Center Directors, Board members, and volunteers • Examine current programming across all centers and all home delivered meal programs • Determine if there is program overlap among centers • Determine why programs are being offered • Research other senior/ community centers in Greater Cleveland 	<ul style="list-style-type: none"> • Are programs offered based on <ul style="list-style-type: none"> • current clients? • greater community? • both? • What programs do other centers offer? • What are the attendance rates at other centers? • Who are other centers serving? Who is their core client? • What needs are other centers fulfilling? 		
	2. Conceptualize new GAC program model	<ul style="list-style-type: none"> • Use previous evaluation of current programs (home delivered meals, community centers, supportive housing centers) to develop new program model • Determine and develop what programs (if any) will be consistently offered across locations • Establish a model for offering “special programs” at centers 	<ul style="list-style-type: none"> • Should the model be program focused or center focused? 		

<p>3. Expand Home Delivered Meal offering</p>	<ul style="list-style-type: none"> • Continue to build infrastructure to support expansion of demand by PASSPORT and OPTIONS program • Explore joint ventures with “fee based” meals on wheel programs • Explore alternative delivery methods including delivery of frozen meals on a weekly basis • Explore ways to increase human contact potential 	<ul style="list-style-type: none"> • Can delivery routes and assets be better leveraged? 		
<p>4. Strengthen supportive housing programming and partnerships</p>	<ul style="list-style-type: none"> • Expand joint care relationships between GAC with CMHA and Eliza Bryant • Expand care relationships with County DSAS program, BRI, and the Visiting Nurse Association • Develop new programming that is attractive to building residents 			

<p>5. Examine and update community center programming</p>	<ul style="list-style-type: none"> • Form task force with younger groups (aged 50-65) to determine their immediate needs for programming • Form task force with newly arriving seniors (65-75) not attending centers to determine what needs they have that are <u>not</u> being addressed by current senior centers • Form task force of existing center participants to address needs 	<ul style="list-style-type: none"> • Consider: <ul style="list-style-type: none"> • Employment • Computer training for employment skills • Support groups • Pre-retirement groups • Financial planning groups • Part-time employment including starting small business • College level enrichment classes • Travel planning including RV groups, car travelers, connection to Elder Hostel • Classes in fine arts including painting and sculpting 		
<p>6. Build marketing plan to advertise continuous and special programs</p>	<ul style="list-style-type: none"> • Develop branding and co-branding strategy 	<ul style="list-style-type: none"> • Consider how to attract new participants • Consider how to promote centers • Consider collaborative partnerships to help pay for and advertise program 		

Goal 3: Diversify funding streams by reexamining current funding methods and developing new ones

Fundraising	Strategy	Action Steps	Reoccurring Discussion	Responsibility	Timeframe
	1. Create capital campaign to build endowment				
	2. Revisit current development plan	<ul style="list-style-type: none"> Form a task force to prioritize and examine old and new funding ideas and methods Revisit and rethink current funding “basket.” 	<ul style="list-style-type: none"> Task force work should be clear, concise and attainable. All current and new funding ideas and methods are on the table 		
	3. Explore new funding opportunities	<ul style="list-style-type: none"> Task force discussion of possible funding streams Develop 60-second elevator speech for all stakeholders (see Goal Matrix – Governance) Discuss community members role in GAC functioning (See Goal Matrix – Governance) 	<ul style="list-style-type: none"> Possible funding stream areas including: individuals/corporate/ foundations/government/ minority business owners Legacy giving for corporations leaving Cleveland (do we have people to contact them on their way out of town?) Develop an Adopt-a-Center program. Is this a good idea to test? Recruit a high-profile “champion” to represent the organization in the community Recruit non-board members to take on leadership roles in the Resource Guide and Golden Achievement Awards 		

	<p>4. Write a new development plan</p>	<ul style="list-style-type: none"> • Determine most effective mix of current funding streams and new opportunities • Write concise plan to assist development director in fundraising • Develop branding and co-branding strategy (see Goal Matrix – Programs) 			
--	--	---	--	--	--

Goal 4: Develop and implement a succession plan for key staff

Human Resources	Strategy	Action Steps	Reoccurring Discussion	Responsibility	Timeframe
	1. Develop a CEO and Assistant Director recruitment strategy	<ul style="list-style-type: none"> Define the characteristics of a new CEO Seek foundation support to fund a 4 year transition period Seek an Assistant Director with the education, experience, skills and temperament to assume the CEO position 	<ul style="list-style-type: none"> After two years, Assistant Director become COO, CEO reduces time to 60% COO becomes CEO after another year, CEO retains title of President and reduces time to 40% June 2010, President retires, CEO assumes position of President, Board determines the need for an Associate Director and the skill set required to compliment the skills and responsibilities of President/CEO 		
	2. Succession plan for center directors	<ul style="list-style-type: none"> New Assistant Director will help each center draft “mini-strategic” plans based on the organizational strategic plan After codifying a vision for centers (see Goal Matrix - Programs), convene a panel that will craft job descriptions for new center directors or new center positions 	<ul style="list-style-type: none"> The final document should include a list of qualifications and level of experience that potential candidates should possess The panel needs to evaluate the most effective deployment of these employees: should there be a central activity coordinator? Should centers share directors? Formal recommendation as to how to recruit the ideal candidates (job fair, etc.) 		

	<p>3. Succession plan for Development Director</p>	<ul style="list-style-type: none"> • CEO, Assistant Director, and current Development Director review and revise job description • Develop conceptual action plan for recruit of new director (when needed) 	<ul style="list-style-type: none"> • New CEO and Development Director should take recommendations from the Goals Matrix - Fundraising • Which of the functions that the CEO currently handles should be handled by the development director? • Does this person need to be in charge of marketing as well? 		
--	--	---	---	--	--

Goal 5: Continue to develop an active and diverse Board

Governance	Strategy	Action Steps	Reoccurring Discussion	Responsibility	Timeframe
	1. Clarify the roles and expectations of board members	<ul style="list-style-type: none"> Educate Board members about GAC programs by selecting a staff member to present on current programs and challenges at each board meeting. Educate Board members about duties and best practices through BVU workshops. Build task forces to work on focused projects Develop a “60 second elevator speech” (see Goal Matrix – Fundraising) 	<ul style="list-style-type: none"> Board members need to advocate the mission of GAC to political figures – increase the visibility of the organization Each Board member has a purpose to participate with chairing a committee or fundraising Is the board too large? Small committees can be made up of a combination board members, field experts, and other non-board 		
	2. Recruitment of new board members and committee members	<ul style="list-style-type: none"> Request assistance finding diverse Board members from BVU. Recruit “champion” to assist with fundraising 	<ul style="list-style-type: none"> Do we need to add Board members or can these people serve in another capacity? Coincides with Fundraising goals – a champion is needed to help push GACs mission onto a larger agenda Look for younger adults to be involved with the board Consider industry professionals Consider minority businesses Review skill matrix for current and new board members to determine needed skill sets 		

Conclusion

Given its longstanding tradition of superior service and expertise, Golden Age Centers is well-positioned to grow and evolve in order to continue providing relevant services to clients who have constantly changing needs. This was a lengthy and intensive process that took many months to complete. The real challenge lies ahead as this plan is converted into actions over the next several years. The consulting team would like to thank all of the people that participated in this endeavor. We were encouraged by the enthusiasm, creativity, and commitment that was shown towards a very noble and worthy organization.

Grow old with me the best is yet to come.

~Robert Browning

Glossary of Strategic Planning Terms

Critical Issues: The difficult questions and choices facing the organization.

Environmental Scan: An analysis of the external forces that effect the environment in which an organization functions. Trends were determined in the following areas: social/demographic, economic, legal/political, technology, volunteerism, funding/fundraising, and the aging industry.

Goal: A long-term organizational target or direction of development. It states what the organization wants to accomplish or become over the next several years. Goals provide the basis for decisions about the nature, scope and relative priorities of all projects and activities. Everything the organization does should help it move toward attainment of one or more goals.

Mission Statement: A statement of organizational purpose.

Perceptual Analysis: A compilation of the perceptions of key stakeholders obtained through surveys, interviews, and focus groups.

Planning-to-Plan Meeting: A meeting between key internal decision makers or opinion leaders to develop an initial agreement about the overall strategic planning effort and main planning steps.

Stakeholder: Any person, group or organization that can place a claim on an organization's attention, resources, or output, or is affected by that output.

Strategic Plan: A practical, action-oriented guide based on an examination of internal and external factors that directs goal-setting and resource allocation to achieve meaningful results over time.

Strategic Planning: A disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it.

Strategic Planning Committee: A group of stakeholders that understand the organization and its climate and have a desire to move the organization forward.

Strategy: The means by which an organization intends to accomplish a goal. It summarizes a pattern across policies, programs, projects, actions, decisions, and resource allocations.

SWOT: Analysis of the organization's strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are usually internal and refer to the present capacity of the organization whereas opportunities and threats are typically external and refer to future potentials.

Tactical Plan: A continuous process where people make decisions about how outcomes are to be accomplished, what products will be produced, how success is measured and evaluated, and how budgetary resources are allocated.

Values: A description of the code of behavior (in relation to employees, other key stakeholders, and society at large) to which an organization adheres or aspires.