

**Senior Services**



**Southwest  
Michigan**

# **Integrated Strategic Plan**

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**Senior Services**



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Senior Services promotes the well being of older Adults through the provision of services and opportunities in the areas of Information and Assessment, Personal Enrichment, Community and Home Based Services, and Behavioral Health. With over 50 years of service to seniors and their families, our mission has remained unchanged. We accomplish this through the support and expertise of our caring professional staff and volunteers.

### **Our Mission**

To enhance and promote the independence and well-being of older adults, adults with disabilities and those who care for them.

### **Our Vision**

To be the leader in providing innovative and quality services and opportunities to older adults, adults with disabilities and their caregivers.

### **Our Values**

#### **Advocacy**

- Acting on behalf of the most vulnerable

#### **Collaboration**

- Working with others to meet community needs

#### **Compassion**

- Treating our consumers with respect and dignity

#### **Diversity**

- Reflecting our community's diversity and culture in all aspects

#### **Service**

- celebrating the contributions of staff and volunteers

#### **Accountability**

- Using our resources wisely and effectively



In 2014, Senior Services, of Southwest Michigan celebrates fifty-one years as a primary provider of in-home and community services for older adults, caregivers and adults with disabilities. Over more than five decades, we have grown to provide specific programs covering a five county region. We offer twenty-one different community based and in-home support services to more than 10,000 older adults each year. After these many years of service and advocacy on behalf of older adults, our philosophy and mission remain unchanged; to enhance and promote the independence and well-being of older adults, adults with disabilities and those who care for them.

Senior Services existing Strategic Plan began in the fall of 2010 and has continued, with reviews and resolutions, through the end of 2013. The Strategic Plan presented here is reflective of the continuing process to achieve the next milestone in our Planning. This is a process that Senior Services employs to insure that our Strategic Initiatives and the Plan itself reflect the ongoing changes in our environment.

Faced with challenging economic and governmental changes, Senior Services of Southwest Michigan began a planful journey towards addressing many factors facing this organization and the people we serve.

Foremost in the planning process was the realization that as our agency struggles to meet the needs of an increasing population of vulnerable clients, we also need to be even more creative in accomplishing our mission. During the term of this new plan we will be challenged as never before to change and adapt as we continue our proud tradition of leadership and innovation.

Prior to the development of the Strategic Plan, efforts were made to analyze our existing services, consider the addition of new business ventures, assure program and staff success, enhance excellence in service delivery, promote coordination with other agencies, increase customer satisfaction and further stabilize the agency's financial future.

In the process of developing this plan we specifically invited input from all of our stakeholder groups. We solicited scheduled formal written and/or verbal input from stakeholders during January-February 2014, either in groups or individually. We interviewed eighteen Community Partner Organizations, Consumer Groups including Congregate Meal Site participants and Senior Volunteers, and nine Key stakeholder organizations. Internally Senior Services staff, the Administrative Team, and the Board of Directors were interviewed. Results of current satisfaction surveys by consumers in all programs areas were also submitted and analyzed during this process. This extensive input added greatly to the identification of the Goals and objectives included in this Plan.



A review of key events in the environment impacting Senior Services, Inc. revealed issues in three primary areas:

**External**—Key external events were examined, including uncertainties caused by dramatic changes in the MI CHOICE Waiver program and the Integrated Care Initiative. Actions by community funders were reviewed as well, with Senior Services, Inc. experiencing reduced funding from the United Way of Battle Creek and Kalamazoo Region and the Area Agency on Aging. Expansion of our programs in Calhoun County was also a major consideration.

**Target Populations**— Indications are that the need for services to assist older adults will continue to dramatically increase over the next several decades. The current difficult economic situation will exacerbate this phenomenon. The older adult population is the fastest growing group in the United States, with those 85 years of age and older increasing the most rapidly. This increase in longevity will result in escalating demands for services. Other changes to the demographics of seniors include the “baby-boomers” who are now entering “senior” status, and who will demand and require a different set of services, options and choices. The scope of Senior Services, Inc. and an increasing need to meet the needs of these diverse populations are reflected in the Strategic Initiatives in this plan.

**Internal and Infrastructure**—Resources in several program areas have suffered funding losses or changes in the current year, while others have seen dramatic territory expansion and corresponding funding increases. Our capacities and expertise remain strong, with initiatives planned for new business ventures to assure program success, and enhance excellence in service delivery. Our leadership in the aging community will be called on more in the near future as we continue our success in promoting coordination with other agencies, increase customer satisfaction and serve to stabilize our agency’s financial future.

The leadership challenge to Senior Services, Inc. is to confront these phenomena with a plan of action, both to safeguard the well being of our constituents, and to ensure our adaptability and readiness as an agency to move successfully forward.



In the development of this Plan, we first analyzed our existing services then reviewed changes/enhancements to our present programs to meet the needs of an increasing population of vulnerable clients. We further committed the agency to enhanced excellence in service delivery, support for our employees, increased customer satisfaction and the critical necessity of stabilizing our organization's financial future.

The following Principles and Decision Making guidelines were established at the start of this process:

- Focus all decisions on the Mission, Vision and Values of the organization
- Support our mission and our core functions
- Maintain the capacity to serve our clients; especially those who are most vulnerable
- Link decisions to the agency's Strategic Plan
- Utilize an open and transparent process throughout the development of this plan
- Explore opportunities to improve our agency and diversify its funding
- Work to protect our staff and their families
- Identify and implement additional efficiencies wherever possible
- Utilize a SWOT analysis to evaluate the Strengths, Weaknesses, Opportunities, and Threats for our agency
- Be open and transparent in the planning process and seek input from all
- Share information, as appropriate, to assure that all staff receive timely, adequate, and accurate information without undue stress
- Set goals based on where we want our agency to be in the future, not on the short-term challenges that face us at any one time



# **Strategic Goals and Objectives**

**2014-2016**



## ADDRRESING CONSUMER NEED

### **STRATEGIC GOAL 1. Build Success Strategies and Revenue Producing Options for Programs and Services to Meet Community Need**

OBJECTIVES	TIMETABLE/ ACTION STEPS	RESPONSIBLE PERSON/ MONITOR	INTENDED OUTCOMES
Volunteer Programs – Determine Future Strategic Direction to Maintain, Reduce or Transition volunteer programs w/timelines and action steps for implementation	1) Determine the direction/plan for volunteer programs. <b>3-6 mos.</b>  2) Implement Plan <b>12/18 mos.</b>	Tauhric Brown/ Admin. Team	Successful Plan implementation will result in meeting senior/community needs to the best of our ability.
Information & Assistance – Develop Strategic Plan to Maintain/Grow this service and develop timelines and action steps. Reinforce identity as an I & A resource by enhancing relationships with funders and community, through marketing and information sharing.	1) Determine the direction/plan for I & A programs. <b>3-6 mos.</b>  2) Implement Plan <b>12/18 mos.</b>	Tauhric Brown/ Admin. Team	Successful Plan implementation will result in meeting senior/community needs to the best of our ability.
Senior ACT – Determine Future Strategic Direction to Maintain and/or Transition to a more cost effective model and develop timelines and action steps.	1) Determine the direction/plan for Senior ACT/behavioral health programs. <b>3-6 mos.</b>  2) Implement Plan <b>12/18 mos.</b>	John Grib/Admin Team	Successful Plan implementation will result in meeting senior/community needs to the best of our ability.
Transportation – Complete operational plan reflecting its function as a source of program support, not a stand-alone program.	1) Complete operational plan <b>4 mos.</b>  2) Implement Plan <b>12/18 mos.</b>	Dave Carroll/Admin Team	Improved clarity/efficiency in meeting the Transportation needs of agency programs and customers.
Catering and Food for All - Complete Business Plan addressing revenue plans and marketing and sales promotion.	1) Complete business plan <b>3 mos.</b>	Dave Carroll/ Admin Team	Increased revenue for food production and improved ability to provide quality meal service for seniors and the community.

Develop/Implement Dashboards to monitor growth/cost in vulnerable service programs.	<p>1) Complete /Implement Dashboards <b>3 mos.</b></p> <p>2) Provide Quarterly to Admin for review and discussion.</p>	Tauhric Brown/ Admin Team	Increased information to support good decision making in vulnerable programs.
Fund Development – Develop and Implement strategies to enhance revenue for vulnerable service programs.	<p>1) Identify potential funding sources <b>3/6 mos.</b></p> <p>2) Develop and Implement strategies to gain funds for programs. <b>12/18 mos.</b></p>	Kathleen Kelleher/ Admin Team	Successful Plan will increase funding available for vulnerable service programs

**TECHNOLOGY**

**STRATEGIC GOAL 2.**

**Enhance Technological Communication and Capacity to meet Programmatic needs.**

<b>OBJECTIVES</b>	<b>TIMETABLE/ ACTION STEPS</b>	<b>RESPONSIBLE PERSON/ MONITOR</b>	<b>INTENDED OUTCOMES</b>
Establish core computer competencies and develop and provide appropriate training for all staff.	<p>1) Establish Core levels of computer competencies for staff. <b>6/12 mos.</b></p> <p>2) Develop Trainings to support achievement of competencies. <b>18/24 mos.</b></p>	Admin Team/IT	Increase users' ability to use technology to enhance service provision.
Develop teamwork approach to insure a good understanding of Technological applications.	<p>1) Identify 'Lead' staff in various program/IT functions to support learning. <b>12 mos.</b></p>	Admin Team- /IT	Increased knowledge and better time management in computer application.



	2) Educate staff to enhance competent computer use/problem solving skills. <b>12/24 mos.</b>		
Develop an input plan for collaboration and communication across programs to determine need/priority of proposed upgrades in various areas of the agency.	1) Identify team leaders in all areas to enhance IT communication. <b>12 mos.</b>  2) Initiate format for collaboration of IT/area leaders to determine and support agency priorities/needs <b>12/18 mos.</b>	Admin Team/IT	Achieve more cohesive decision making and planning.

**STAFF LEADERSHIP/DEVELOPMENT**

**STRATEGIC GOAL 3. Enhance Internal Staff Development and Organizational Accountability**

<b>OBJECTIVES</b>	<b>TIMETABLE ACTION STEPS</b>	<b>RESPONSIBLE PERSON/ MONITOR</b>	<b>INTENDED OUTCOMES</b>
Objective: Create systemic enhancement of the behaviors and shared values of the staff that reflect the mission, vision and values of Senior Services.	1) Implement separation of Staff Development Committee by function to enhance training and recognition outcomes for all staff: a. Staff Development Training Team b. Staff Recognition /Activities Team <b>6 mos.</b>  2) Provide staff training to 'build team' and explain expected behaviors to reflect the mission and goals of the agency. <b>12 mos.</b>	Admin Team	Increased accountability and enhanced understanding of the purpose of the Agency, and staff role in achieving the mission, vision, and values of Senior Services.

	<p>3) Develop appropriate training for Supervisors, Managers, and Directors to support achievement of expected competencies and performance expectations at all levels.</p> <p><b>18 mos.</b></p>		
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STRATEGIC GOAL 4. Enhance Volunteer based services that produce positive outcomes for Consumers

OBJECTIVES	TIMETABLE ACTION STEPS	RESPONSIBLE PERSON/MONITOR	INTENDED OUTCOMES
Expand utilization of non-paid skilled interns and trained senior/community volunteers.	<p>1) Expand and further develop relationships and internship opportunities with WMU, KVCC, Kalamazoo College, AARP and other educational and training institutions.</p> <p><b>12/18 mos.</b></p>	Admin Team	Increase the positive outcomes for senior customers in need of service support.

## FUTURE SERVICE PLANNING/PARTNERSHIPS

STRATEGIC GOAL 5. : Evaluate our Model of Service Delivery and Build Strategic Partnerships to accomplish targeted future growth and direction throughout the region.

OBJECTIVES	TIMETABLE ACTION STEPS	RESPONSIBLE PERSON/ MONITOR	INTENDED OUTCOMES
Explore alternative structural arrangements to address the need for separation of organizational activity.	1) Assess the need for alternative structure. <b>18 mos.</b>  2) Explore options in specific related program areas i.e. Waiver and Home Care <b>18/24 mos.</b>	John Grib, Tauhric Brown/Admin Team	Determination of need/resolution to eliminate the appearance of conflict of interest.
Develop agency strategies to create, enhance and expand collaborations with community, regional, state and federal partners.	1) Pursue leadership roles in collaborations at all levels. <b>12/36 mos.</b>  2) Expand partnerships in response to changes/initiatives occurring in Waiver and Integrated Care at the State and Federal levels. <b>12 mos.</b>  3) Continue involvement in PACE, ADRC, and Behavioral Health initiatives as these efforts continue to evolve. <b>12/36 mos.</b>	Admin. Team	Increased understanding between Senior Services and other identified organizations, resulting in improved relationships and beneficial partnerships.

	<p>4) Develop /Maintain/Expand key partnerships to include; the Hospital systems in SW MI, UWBCKR, AAA network, Kalamazoo, Battle Creek and other area Foundations. <b>12/36 mos.</b></p>		
<p>Create/participate in advocacy activities and events with community partners and supporters.</p>	<p>1) Develop and participate in activities and promotions highlighting advocacy concerns. <b>6/36 mos.</b></p> <p>2) Engage community and governmental leaders in identified advocacy targets.</p>	Admin Team	<p>Develop an Increased community awareness of unmet needs of our customers and Senior Services efforts to address and resolve those barriers.</p>
<p>Explore and expand regional opportunities for service expansion, with governmental entities, and not for profit groups, particularly in the areas of Food services and In-Home care.</p>	<p>1) Identify potential service targets and timelines <b>12/24 mos.</b></p> <p>2) Pursue implementation plans to incorporate expansion into current operations. <b>6/24 mos.</b></p>	Admin Team	<p>Increased ability to achieve future growth through the creation of new program and service opportunities</p>