

Hillsdale County Senior Services Center Strategic Plan 2024-2029

Growing to Serve

The Center pledges reliable, compassionate help and encouragement to older persons while promoting good health, independence, and community involvement.



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**Presented by Patrice Martin of Innovative
Community Solutions and Julie Hales-Smith of
North Coast Community Consultants**

Overview

The Hillsdale County Senior Services Center, a private non-profit organization established in 1983, is "Growing to Serve." The Center is a place where older persons meet to pursue mutual interests, receive services, and take part in programs and services which will enhance their dignity, improve their health, support their independence, and encourage their involvement in the community.

In 2023, the Center launched a comprehensive strategic planning process and engaged the services of Innovative Community Solutions and North Coast Community Consultants to lead the process. This document reflects the entirety of the planning process and its outcomes.

This strategic plan is the result of a data-informed approach that engaged the Center's staff and board members, and stakeholders throughout the community and beyond. Community data was culled from a variety of relevant sources and the data was thoughtfully explored and processed by those participating in the development of the plan.

Online surveys of the board and staff conducted in advance of the in-person planning sessions revealed a deep commitment to the work of the Center. In fact, the board survey enjoyed a response rate of 83%, while the staff survey garnered a response rate of 66%. The stakeholder interviews were overwhelmingly positive, while also providing some meaningful feedback about how the Center might prioritize its focus for the future.

Two in-person planning sessions were held with both staff leadership and board members. A third in-person session was conducted with staff leadership to explore and organize the strategies necessary to achieve the overarching objectives and goals developed by the board with input from staff. It is the belief of your consultants that the resulting strategic plan well positions the Center to manage the challenges of the present while preparing itself for continued success in the future.

"They are excellent at meeting their clients where they are at – a true client centered approach. They provide excellent services and a community for folks."

"What do they do best? They have the seniors' backs."
(Stakeholder Interviews. 6/26/2023)

Executive Summary

The Planning Process

Perennial Park, also known as the Hillsdale County Senior Services Center (the Center) has enjoyed widespread community support throughout its history and has expanded and adapted its programming and services in response to the changing needs of Hillsdale County's senior population. Several visionary but big-ticket goals remain to be achieved, most notably a senior housing development adjacent to the Center and a therapeutic swimming pool.

The Center's board of directors approved a planning process designed to guide the board and staff in exploring relevant data to help determine the future of the organization. The final plan defines a future vision for the organization and organizes priorities and goals for the next 3-5 years. The overall deliverable creates opportunities to influence change within and outside of the organization and provides guidance for growth and sustainability.

Facilitators for the strategic planning process are Patrice Martin of Innovative Community Solutions and Julie Hales-Smith of North Coast Community Consultants. While there are many approaches to strategic planning, it is the bias of your facilitators that the simpler and more straightforward – the better. Complex and overly complicated plans tend to gather dust on a forgotten shelf, rather than inspire action based on a clear and compelling vision of the organization's future.

Initial conversations with Center staff revealed the existence of several community data sets that are relevant to the work of the Center. Specifically, the Community Health Needs Survey conducted by Hillsdale Hospital, the Community Needs Survey conducted by Community Action Agency, and the most recent Region 2 Area Agency on Aging needs assessment. Additional data was collected by your facilitators and presented during the initial planning session. All these data sets were reviewed and evaluated to help inform the future of the Center and the overall strategic plan.

Ideally, your plan serves to transform the organization from its current reality to a desired future state. Following the data review, we assessed the Center's current state to ensure that everyone was working from the same pool of information. Following this assessment, we articulated the desired future state, describing the vision of what the Center hopes to create because of its work. Defining a vision that is shared by everyone in the organization guides effective decision-making. This vision acts as a lens through which opportunities, ideas and potential actions are filtered. What follows is a roadmap that will drive decision-making as the organization works toward achieving its desired future state.

To frame the exploration of the current state and the desired future state, we introduced an adaptation of the Balanced Scorecard model of four organizational perspectives. Balanced Scorecard

is a performance management process developed by Dr. Robert Kaplan and Dr. David Norton. While we do not intend to incorporate the entirety of the original Balanced Scorecard model, we find the four perspectives are applicable to any organization. These perspectives allow for specific focus on each component, while still attending to the overall strategic vision of the organization.

The Financial Perspective

Focuses on financial performance of an organization. The financial health of an organization is a critical perspective for boards to track. It is important to note that financial performance is usually the result of good performance in the other three scorecard perspectives.

The Customer/Stakeholder Perspective

Focuses on the value propositions of the organization as they relate to customers; customers here defined broadly as consumers, communities, stakeholders, and donors. This perspective addresses understanding, articulating, and communicating value to the customer/stakeholder.

The Internal Assets Perspective

Focuses on tangible, physical assets, the efficiency of an organization's internal operations, and the key processes necessary to deliver the customer objectives. Here, we consider the internal assets, systems and processes, and the things the organization must do really well in order to work its mission.

The People and Learning Perspective

Focuses on the intangible drivers of the organization and is often broken down into the following components:

- Human Capital (skills, talent, and knowledge)
- Development (culture of learning)
- Organization Capital (leadership, employee and board alignment, teamwork and knowledge management)

For each of the four perspective categories, we identified overarching objectives, followed by broad and continuous goals, outcomes/measures of success and initial 12-18-month strategies. Once prioritized, the strategies will take the form of action plans developed and driven largely by staff. The development of action plans will also identify the resources, responsibilities, measures and timelines expected to work the prioritized strategies.

Our recommendation is that implementation strategies be prioritized through an analysis of capacity and resources – both existing and what might need to be acquired. Then, reflecting on how a possible strategy might contribute to the measures of success defined for each goal,

While your facilitators have provided an action planning template, we strongly encourage exploring any existing process or system that may be adapted to include action steps. This recommendation applies to all elements of your final strategic plan.

The overall planning process consisted of the following:

1. Community Data Review and Evaluation
2. Stakeholder Interviews
3. Online Board survey
4. Online Staff survey
5. Two in-person planning sessions with board and staff leadership
6. One in-person planning session with staff leadership
7. Presentation of the plan to the board and staff leadership

Detailed summaries of items 1-4 are contained in Appendix A. These data sets were presented and explored during the first in-person planning session and provided important information for the board and staff leadership to consider as the development of the plan unfolded.

Planning Session I – July 18, 2023

Our initial in-person planning session included members of the board of directors, and staff leadership led by the Center’s new executive director, Maggi Monroe. The agenda for the day included a review of the planning process including a delineation of board roles and staff roles, the presentation of the collected data sets and the current state-future state mapping.

The session was arranged so that individuals participated as part of the whole group, while also conducting reflection and dialogue in smaller groups. We began the session by exploring the expectations of the planning process.

This conversation produced the following:

- Understand the process, the outcomes and (everyone’s) role
- Overview of where we are (current state) and our vision for the future (future state), and how to get there
- How to sustainably fund the proposed pool addition
- Financial independence and sustainability
- Build the team and accomplish big goals
- Focus on the mission and vision of the Center and how the work aligns
- More community engagement
- Enhanced facilities and how to sustainably fund it
- Understand the options and process for developing affordable housing
- Support the Center

Next, the group was asked to pair up and interview one another with the following questions: *What attracted you to join the Center? What keeps you engaged?* Then, the pairs were instructed to share with their partner a story of time when they felt the proudest of, or the most connected to the work of the Center. This exercise revealed the following points of pride:

- *During one of the past winter's harsh weather events, the Center staff came together to serve the community members who had gathered at the Center.*
- *When needed, staff leadership will step up and provide direct services, or perform any tasks in support of the continuity of client services.*
- *When they hear how people from outside of the community are impressed by the scope of services provided by the Center.*
- *The Center serves people at their most basic needs level.*
- *The family atmosphere demonstrated throughout the Center.*

The discussion then shifted to the overall planning process, roles and expectations and the ultimate deliverables. A copy of the PowerPoint that guided our session is included as Appendix A. Of particular importance is what roles everyone plays in the development of the plan, its subsequent implementation and the monitoring and evaluation of the plan. The board's primary role in the strategic planning process is to define the vision for the organization's future – big picture. The role of staff leadership is to contribute to the development of the vision, and then to develop and implement strategies designed to move the organization toward that future vision. Both board and staff will monitor and evaluate the progress of the plan implementation and goal achievement.

Data Processing

The next step in our process was to review and process the collected data. Sources of the data are:

Community-Informed Data

- MDHHS Aging & Adult Services Agency State Plan FY2021-2023
<https://www.michigan.gov/mdhhs/adult-child-serv/adults-and-seniors/behavioral-and-physical-health-and-aging-services/plan-on-aging>
- 2022 BHSJ Health Department Annual Report
https://bhsj.org/uploads/resource/attachment/2037/2022_Annual_Report_boh.pdf
- 2022 Community Action Agency Community Needs Assessment
<https://www.caajlh.org/~documents/route%3A/download/8082/>
- 2022 Hillsdale Community Health Center Assessment
<https://www.hillsdalehospital.com/wp-content/uploads/2022/06/HCHC-Assessment-2022-Final-Draft-BOT.pdf>
- Region II Area Agency on Aging 2022 Community Needs Assessment (Copy included in Appendix A)

Stakeholder Interviews

- Number interviewed: 18
- Timeframe: June 9-29, 2023
- Stakeholder affiliation:
 - Nonprofit Org. – 4
 - Governmental Agency – 4
 - Client – 4
 - Caregiver – 3
 - Volunteer - 3

Board and Staff Online Surveys

- Staff survey included workplace culture assessment and visioning questions
- Board survey included board culture assessment and visioning questions

These data sets and highlights identified by the participants are included in Appendix A.

General data about Hillsdale County was also presented:

- The 2022 population is estimated at 45,792 (*relatively stable since 1970*)
- The percentage of residents aged 65 or over is 20.7%
- Median household income is \$54,110 (state average is \$63,498)
- Households in poverty are 14% (state average is 13%) *Hillsdale County is not the poorest county in the state. That honor belongs to Isabella County whose poverty rate is 23.4%.*
- Labor Force Participation Rate is 56% (state average is 61%)

Following a thorough review and discussion about each of the data sets, the participants then engaged in an exercise to clarify the Center's current state, followed by envisioning its desired future state. The raw data from these activities is found in Appendix A.

The next step in the process fell to your consultants who distilled the results of Session I into a draft plan to include:

- Strategic Direction (Desired Future State)
- Strategic Objectives for each of the Four Perspectives
- Broad and continuous goals for each perspective
- Draft Measures of Success for each goal

Planning Session II – August 9, 2023

The primary purpose of Session II was to give the board and staff leadership the opportunity to review and refine the draft plan. Each element of the draft was presented in order, guiding questions were offered and the language was refined for clarity and intent where needed. The PowerPoint that guided Session II is included as Appendix B. The results of this process follow.

Strategic Direction: *A description of the desired future state of the Center. Defines what the Center will look like once it's achieved its objectives and goals.*

In 2029, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

Strategic Objectives: *Objectives that are specific to the organizational perspective, while also contributing to the desired future state.*

Goals: *Goals that are broad and continuous. Designed to move the Center closer to its strategic objective, and therefore, its desired future state.*

Guiding Questions:

- *Does each objective contribute to the strategic direction?*
- *Does each goal support its strategic objective?*
- *Will the objectives and goals move the Center in the direction of its desired future state?*
- *Are each of these goals clear and achievable?*
- *Do the goals stimulate thinking about specific strategies?*

Measures of Success

Measures of success serve to answer the question, "What happens if we achieve our vision?"

Measures assist in setting benchmarks that the organization will look for as it develops strategies and deploys its action plans. They are indicators of performance, helping to track whether a particular strategy or approach is working, and encouraging and allowing for adjustment.

Guiding questions:

- What do we expect to be different?
- What specifically do we expect to accomplish?
- What are some benchmarks, or incremental changes we might expect to see?
- How might we measure performance or progress?

The work of Session I, as well as information culled from the board and staff online surveys already produced several Measures of Success for each of the draft goals. During Session II, the participants reflected on and refined these measures.

Financial Perspective

Strategic Objective: Financial stability and sustainability with sound fiscal management practices.

Goals	Measures of Success
1. Budgets are reflective of future growth.	Annual increases in operational reserves. Consistent cost-of-living increases. The Center's assets and facilities are well-maintained and/or replaced as scheduled. Technology and staff resources are state-of-the-art.
2. Existing sources of funding are stabilized.	Budgeting challenges are managed. Relationships with funders are maximized. Opportunities to develop new funding sources.
3. Unrestricted funding is increased.	Additional unrestricted funding sources are cultivated and maintained. Annual increases in operational reserves.

Customer/Stakeholder Perspective

Strategic Objective: The Center is adaptive to the emerging needs of the people and communities it serves.

Goals	Measures of Success
1. Internal capacity is adaptive to serve current and future client needs.	Increase in unduplicated clients served across the Center and specific services/programs by 5% annually. Wait lists are reduced by 5% quarterly or eliminated. Services are data driven. Equitable, data driven service distribution throughout the county.
2. The community's knowledge and understanding of the Center's programs and services is increased.	Messaging is consistent throughout all outreach channels. Perceptions of the Center are improved across multiple generations.
3. External collaborative partnerships and relationships are expanded.	Increased collaborative relationships with all stakeholder groups. Perceptions of the Center are improved across multiple generations.

Internal Assets Perspective

Strategic Objective: Facilities and resources necessary to achieve the Center's mission and serve the community into perpetuity.

Goals	Measures of Success
1. The Center's physical plant and assets accommodate current and future client needs.	Accessible equipment and transportation needs are met. Technology is up-to-date and conducive to staff and client needs. Preventative maintenance and replacement schedules are budgeted for and followed.

	Kitchen facilities are state-of-the-art. Overall waste is greatly reduced. Decision-making is data informed. Funding strategies and timeline targets are met. Housing is developed.
2. <i>Workplace environment, equipment and tools are conducive and adaptive to staff needs.</i>	Ergonomic workspaces are the norm. All employee policies and handbooks are up to date. Decision-making is data informed. Short- and long-term benchmarks toward improving intangible elements of the workplace are developed, tracked and achieved. Technology upgrades and improvements are reflected in the budget.

People and Learning Perspective

Strategic Objective: *Fully engaged, high-performing board, staff, and volunteers, appropriately scaled with robust supports to ensure their success.*

Goals

1. *The board operates at a level necessary to meet the evolving needs of the Center.*

Measures of Success

Board is actively engaged in fund development and fundraising.
 Nonprofit best practices are deployed at the administrative and board levels.
 Budget reflects commitment to professional development for staff and board.
 Board demonstrates its commitment to its development.

2. *A healthy, positive, and desirable workplace environment is actively advanced.*

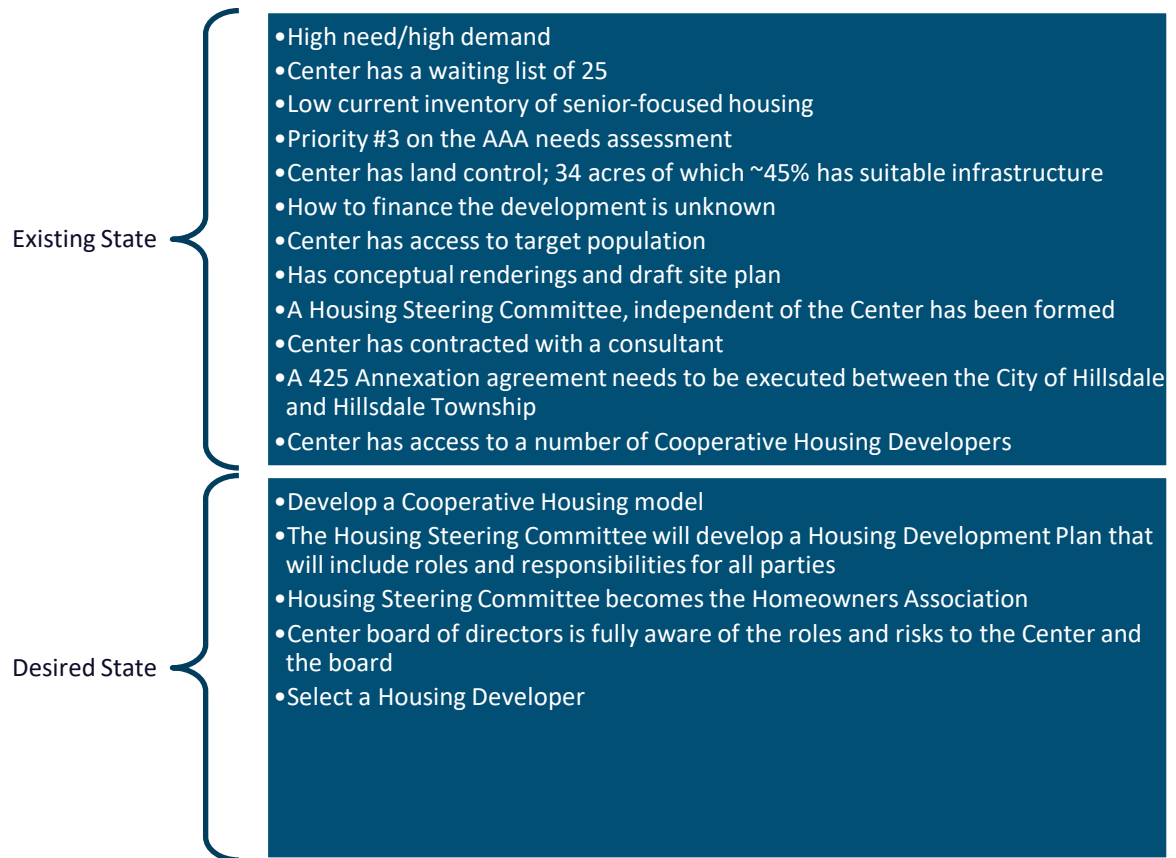
Nonprofit best practices are deployed at the administrative and board levels.
 Overall internal communication is improved.
 The Center is an “employer-of-choice”.
 Budget reflects commitment to professional development for staff and board.
 Staff retention rates have been improved.
 Center values statement is developed, communicated, and widely promoted.

The draft consolidated plan from which the board and staff leadership worked during Session II is included in Appendix B.

Throughout the planning process, questions and comments arose around the topics of the long-planned-for pool and the development of affordable housing targeted to the senior population. Session II concluded with two brief activities designed to provide additional clarity about what might be in the way of the Center making progress toward these capital improvement projects, and how to move forward.

Housing – Existing State/Desired State

To evaluate the status of the Housing Plan and identify the next steps and roles and responsibilities, we generated two charts; one that described the existing state, and a second that described the desired state. What is the overall goal? What resources are required to achieve the desired state? Here are the results of this activity:



Mind-Mapping - Explore the idea of the Pool and what it will take to get there

The Exercise:

Mind mapping is a form of brainstorming in a creative, visual way. The central question or idea is in the center of the map and the group is told to brainstorm the major ideas (or “branches”) using keywords. Subtopics that are related to major ideas become “twigs” off the branches. Participants choose where their idea goes – if it is a “branch” or a “twig”.

Mind mapping was used at the Strategic Planning Session II to brainstorm about the pool. At the end of the exercise, participants prioritized major ideas by placing dots beside the ones that they thought were most important and time sensitive. Each participant was given 3 dots to place.

The Objectives:

Several times throughout the process of strategic planning – the interviews, surveys and meetings with Board and Staff - the topic of building a pool at the Center has been raised. As a major capital project and expense, it was important to address the topic of a pool in earnest during the strategic planning process. The mind mapping exercise, to analyze and prioritize around this project, was conducted to kick start that process.

The Results:

The group enthusiastically brainstormed. They generated ten major ideas regarding the pool: contractor; funding; feasibility; community involvement; high demand; design and construction; staffing; health and wellness; and maintenance. Of these, funding was the highest priority with 16 votes.

A graphic depiction of the Mind Map is included in Appendix B.

Planning Session III – August 21, 2023

The primary purpose of this staff-only session was to engage staff in developing and prioritizing strategies. As we have established, designing strategies largely falls to staff, as they are likely to be responsible for the implementation of the strategies. However, there are several goals that are either the sole responsibility of the board of directors or are goals that are jointly share with executive leadership. All of the goals under the Financial Perspective are joint goals, and goal #1 under the People and Learning Perspective is the sole responsibility of the board. The PowerPoint that guided Session III is included in Appendix C.

The goals for which the staff were assigned for strategy development are:

Customers/Stakeholders:

- *Internal capacity is adaptive to serve current and future client needs.*
- *The community's knowledge and understanding of the Center's programs and services is increased.*
- *External collaborative partnerships and relationships are expanded.*

Internal Assets:

- *The Center's physical plant and assets accommodate current and future client needs.*
- *Workplace environment, equipment and tools are conducive and adaptive to staff needs.*

People and Learning:

- *A healthy, positive and desirable workplace environment is actively advanced.*

For each of the goals, participants were given the following instructions:

- Begin with three ideas – one idea per sticky note
- When you're ready, bring them to the flip chart and read them aloud
- Place your sticky notes where your idea is like another, or place it in a "new" area
- Once all ideas have been grouped, Patrice and Julie summarize the essence of the shared idea

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- Move on to the next goal

The results of this strategy development process were robust. Staff were thoughtful, creative and full of ideas. The results are included in Appendix C, and are also illustrated here:

Customers/Stakeholders Objective: *The Center is adaptive to the emerging needs of the people and communities it serves.*

Goal #1: *Internal capacity is adaptive to serve current and future client needs.*

Strategy #1: Develop methodology and metrics to measure impact and outcomes of existing programs and services.

Suggested Actions/Activities from staff leadership:

- Track referrals from staff, other agencies, clients
- Get feedback from clients to see how to improve services and use positive feedback for marketing
- Be specific when surveying clients and potential clients; are there hindrances to them using our services?
- Research methods used by other successful nonprofits
- Adopt best practices

Strategy #2: Develop processes to guide data-informed decision-making about new programs, program growth, scale, or modification.

Suggested Actions/Activities from staff leadership:

- Conduct surveys to find out client needs and wants
- Develop multigenerational Think Tank
- Multigenerational approach to identifying and addressing current and future needs and to recruit new donors
- Assess data from annual reporting and see what services needs to be expanded, etc.
- Make decisions based on data

Goal #2: The community's knowledge and understanding of the center's programs and services is increased.

Strategy #1: Explore and implement innovative marketing and outreach strategies utilizing technology and social media

Suggested Actions/Activities from staff leadership:

- Innovative and new marketing strategies (QR code)
- Multi-generational approach
- Website; TV; Radio (WCSR live)
- Be adaptive to messaging trends and continually expand and innovate marketing strategies
- Utilize Tik Tok, Instagram etc.
- TV in lobby with info
- Use certain hash tags on social media posts to reach certain demographics

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- Become the community's top-of-mind regarding senior services via relationships with community leaders
 - Ask clients if we can tag them on social media post

Strategy #2: Expand and improve in-person, local and regional outreach opportunities.

Suggested Actions/Activities from staff leadership:

- Have staff put out flyers in shared spaces; make sure all departments are advertised and explained to the public
- Develop ads (movie theatre) and billboards and commercial
- Speak at service clubs, churches; share the mission and services
- Continue engagement with Townships/city meetings; prioritize other civic organizational meetings for director/coordinator talks
- Better communication with public about how center's money is earned and how millage dollars are utilized
- Invite organizations to tour building and send informational packets to potential organizations we would like to work with
- Have a family fun night
- Regular open houses and events/ site tours
- Explore additional in-home social engagement opportunities

Strategy #3: Create a culture of ambassadorship by board, staff and volunteers

Suggested Actions/Activities from staff leadership:

- Encourage staff/employees and Board to share on social media
- Enhance volunteer recruitment
- Educate volunteers
- Be proud of what we do; feel comfortable speaking to friends, family and even strangers about what we do
- Educate staff on all services; they can then spot other needs of clients while conducting their jobs
- Promote volunteers helping online
- Volunteer hours exchanged for events

Goal #3: External collaborative partnerships and relationships are expanded.

Strategy #1: Explore and build relationships with high performing/ best practice organizations

Suggested Actions/Activities from staff leadership:

- Partner with college about professional begging; how to get donors
- Guest speaker from Hillsdale College donor relations dept
- Engage more medical pros for tours and services

Strategy #2: Seek out and cultivate multi-generational partnership opportunities

Suggested Actions/Activities from staff leadership:

- Community Action Agency/Head Start; bring to congregate meals

- Continue to grow multigenerational programs
- Host an event for all generations
- Work with high school for volunteers

Strategy #3: Target collaborations with organizations providing similar/like services

Suggested Actions/Activities from staff leadership:

- Partner more closely with Hillsdale Hospital and their specialty care clinics
- Veterans Administration
- Rebuild relationship with REH (?) regarding medical transportation
- Develop new lines of partnership with other, similar organizations
- Connect with nonprofits that serve meals; possible collaboration to reduce foods costs
- Research organizations that work with similar demographics; get staff suggestion
- Dial-A-Ride; extra transportation for special events

Strategy #4: Maximize services provided by nonprofit and industry specific associations

Suggested Actions/Activities from staff leadership:

- Better utilize current nonprofit memberships
- Leadership participation in county council on aging workgroups
- Collaborate with state agencies to identify trends in care and/or anticipated requirements

Strategy #5: Create/participate in local and regional networking opportunities

Suggested Actions/Activities from staff leadership:

- Speaking engagements to improve communication between agencies
- Network to access new and diverse sources of knowledge and skills, resources
- Create a local nonprofit network, website or discussion board where ideas, wants and needs are shared that will create a collaborative relationship (i.e., Chamber)
- Go to summits and meetings that include a variety of businesses and agencies around the county/state to network with new organizations

Strategy #6: Identify and resolve current gaps in important relationships/collaborations

Suggested Actions/Activities from staff leadership:

- Conduct a gap analysis
- Identify gaps in relationships/agencies and across generations
- Identify gaps in structure of collaborative partnerships
- Develop action plans to support the building/re-building of professional, mutually beneficial relationships

Internal Assets Objective: *Facilities and resources necessary to achieve the Center's mission and serve the community in perpetuity.*

Goal #1: *The Center's physical plant and assets accommodate current and future client needs.*

Strategy #1: Explore and implement innovative approaches to fund existing and new physical plant and assets

Suggested Actions/Activities from staff leadership:

- Look into leasing programs for fitness equipment and for mow vehicles
- Explore additional grant opportunities
- Identify fitness equipment manufacturers and collaborate lease or purchase agreements
- Create a position dedicated to center advancement/proper utilization of assets; create processes; collect data

Strategy #2: Develop a long-range preventative maintenance and replacement plan for Center assets

Suggested Actions/Activities from staff leadership:

- Refine preventative maintenance and replacement schedule for all assets
- More efficient/update Oliver machine for mow
- Steamer for more efficient workflow in kitchen
- Make sure equipment and vans are well-maintained with monthly inspection checks and make sure necessary update or fixes are made
- Continue to use volunteers for maintenance of building and cars while working with other nonprofits
- Increase company vehicles
- Create a new parking lot and delivery drop off plan
- Create better heating/cooling zones
- Look into options for better heating/cooling system for office kitchen; too loud

Strategy #3: Create opportunities for multi-generational, client-informed asset planning

Suggested Actions/Activities from staff leadership:

- Have clients fill out a survey for what equipment/technology the center should add to make it more enjoyable and/or accessible
- Develop a funding strategy for fundraising
- Establish client-based facilities needs (i.e., walking track, swimming pool, etc.)
- Client/community needs survey; review annual survey with data specific questions

Strategy #4: Develop and implement Housing Plan

Suggested Actions/Activities from staff leadership:

- Develop a housing plan for future development with timeline and funding strategies
- Clarify the role and risks to the Center and board of directors
- Identify the housing developer
- Obtain a 425 Annexation agreement between the City of Hillsdale and Hillsdale Township

Goal #2: Workplace environment, equipment and tools are conducive and adaptive to staff needs

Strategy #1: Design and implement an ergonomic workplace environment

Suggested Actions/Activities from staff leadership:

- Conduct an ergonomic workspace assessment/audit
- Desks that can be moved up and down
- Implement ergonomic workspaces
- Research what other offices have been doing to become more ergonomic (and create funding stream to support)

Strategy #2: Develop and implement a balanced, workplace wellness culture**Suggested Actions/Activities from staff leadership:**

- Develop short- and long-term benchmarks towards improving intangible elements of the workplace
- Policies that mandate breaks, take walks, etc.
- Establish staff-based fitness equipment wish list as well as programs
- Have a balance between work and home life
- Workplace environment that supports physical and mental health; healthy workplace food choices, breaks, fairness, and flexibility (Mental health resources)

Strategy #3: Ensure appropriate technology, software and related equipment is available to all staff**Suggested Actions/Activities from staff leadership:**

- Standardize time management systems (MEPRS)
- Develop an office furniture replacement schedule
- Ergonomic desks, keyboards, monitors
- Key fobs/cards to capture time vs entering on phone or computer
- Upgrade computers and training
- Move from desktop to laptops or tablets
- Issue work cell phones
- Continue to be part of pilot program regarding tech
- Engage current software tracking vendor to create unified software solution
- Have staff fill out a survey for what technology they may need for their department to run more efficiently; develop a funding stream or put out a wish list for folks to donate items or money
- Ask staff to report upgrade of tech/equipment needs on a quarterly basis; prioritize from most needed to least. Develop a plan to address most needed.

Strategy #4: Update staff handbook, policies, and procedures**Suggested Actions/Activities from staff leadership:**

- Update employee handbook so more relevant to issues we are now facing
- Have staff go over employee handbook individually and then come together to see what updates need to be made; ask for clarifications; offer any additions and amendments
- Take to Board for approval on a schedule

Strategy #5: Ensure workspaces allow for efficient and effective workflow and performance**Suggested Actions/Activities from staff leadership:**

- Develop a schedule for software updates
- Better office arrangements and positions that are conducive to job description and needs (i.e., Randy not in Mech room; Rob and Dan connected)
- Made sure the office and public areas are clean and always organized; or have scheduled check in days

People and Learning Objective: *Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.*

Goal #2: A healthy, positive, and desirable workplace environment is actively advanced.

Strategy #1: Develop a robust staff recruitment, retention, and succession plan/program

Suggested Actions/Activities from staff leadership:

- Board offers a revised benefits package that meets current market demands (for nonprofits)
- Develop and maintain a turnover ratio that fits the center's needs
- Find ways to retain the good employees
- Pipeline established for prospective employees; internships, paid and unpaid
- Explore other recruiting avenues – schools
- Recruit more staff
- Develop and maintain a strong bench of employees and Board members
- Create cross-functional teams and team members

Strategy #2: Develop an employee-informed recognition, training, and development plan

Suggested Actions/Activities from staff leadership:

- Develop a new staff recognition program
- Get input from staff – what training, education, exposure do they want (even if not work related)
- Introduce all employees to different internal meetings for input and understanding
- Proactive awareness: more mental health awareness tools, plans in place
- Internal minimum standard for professional development

Strategy #3: Develop, document, and acknowledge the demonstration of shared values of the Center

Suggested Actions/Activities from staff leadership:

- Encourage all staff to participate in Tank Talk Tuesdays (?) via email to say what or who they are thankful for at the Center
- Give our recognitions for staff members that highlight how they exemplify our values – share online and in the newsletter
- Develop and document the Center's values

Next steps for the staff will be to prioritize these strategies and to select one or two per goal upon which to focus for the first 12 to 18 months of the plan's implementation. We have offered a Criteria Matrix for this purpose.

The Criteria Matrix is an example of how you might prioritize your strategies. The criteria are based on the types of capacity and resources that are available to you, or those that may need to cultivate. As you consider each strategy, determine the extent to which each strategy passes each criterion. Rate as High (3), Medium (2) or Low (1). Record your results on the criteria matrix and analyze the scores to see which alternative has the highest total points. Once you've scored your strategies, discuss, and select the one or two for which you will create an Action Plan.

Capacity for implementing specific strategies is important to consider. Your strategic plan is intended to guide decision-making over the next three-to-five years. Your opportunities for success greatly increase if you select those strategies for which you are best prepared. An illustration through the lens of a time horizon follows:

Short-Term 12-18 months

- Builds on existing programs/activities
- Active partners/collaborators
- Few obstacles
- Uses existing organizational capacity

Intermediate 2-4 years

- Sufficient data to guide decision-making
- Potential partners interested and willing to collaborate
- Obstacles mostly known and manageable
- Will stretch organizational capacity

Long-term 5-10 years

- No existing or past action/activity
- Need to build community consensus
- Multiple obstacles
- Will require additional organizational capacity

CRITERION	Strategy #1	Strategy #2	Strategy #3	Strategy #4
Availability of resources				
Active partners/collaborators				
Organizational readiness and capacity				
Few known obstacles				
Builds on existing knowledge and assets				
TOTALS:				

The staff-led strategy development session produced an amazing array of ideas. These are likely to inform the action plans once staff have selected their priority strategies. The development of these individual action plans might be guided by the following template:

STRATEGY <i>How do we achieve the goal?</i>	ACTIVITY <i>What are the specific actions/steps we need to take?</i>	RESOURCES <i>The tools needed: staff, time, money, etc.</i>	MEASURES/OUTCOMES <i>Indicators of performance /measure of progress</i>	PERSON(S) RESPONSIBLE <i>Who oversees making this happen?</i>	TIMELINE <i>When do we begin/when will we finish? When do we check in?</i>

The measures of success identified during the development of the action plans will ultimately inform how staff leadership will track and report on their progress. A copy of the action plan template is included in Appendix C.

Presentation to the Board of Directors – August 29, 2023

Members of the Board of Directors and staff leadership gathered to review the final results of the overall planning process. The PowerPoint presentation that guided our discussion is included in Appendix D.

Your facilitators reiterated the roles and responsibilities related to the strategic plan, in particular which goals are shared between the board and executive leadership, and those goals that are largely operational. The goals that are shared encompass all of those that fall within the Financial Perspective. Goal #1 under the People and Learning Perspective belongs to the board.

The following page illustrates the administrative goals and includes measures of success and possible strategies. It is recommended that the executive director and finance director meet with the executive committee of the board to discuss which of the strategies they may wish to pursue, or collectively brainstorm new ideas that will move the Center toward achieving these goals.

NOTE: One potential strategy is to evaluate and rank existing funding sources. Your facilitators have included a Revenue Evaluation Matrix with instructions in Appendix D to assist with this strategy.

Strategic Objective	Overarching Goals	Measures of Success	Possible Strategies
Perspective: Financial			
Financial stability and sustainability with sound fiscal management practices.	Budgets are reflective of future growth.	Annual increases in operational reserves. Consistent cost-of-living increases. The Center's assets and facilities are well maintained and/or replaced as scheduled. Technology and staff resources are state-of-the-art.	Improve budgeting training/development strategies for board and staff.
	Existing sources of funding are stabilized.	Budgeting challenges are managed. Relationships with funders are maximized. Opportunities to develop new funding sources.	Evaluate and rank existing funding sources by level of stability
	Unrestricted funding is increased.	Additional unrestricted funding sources are cultivated and maintained. Annual increases in operational reserves.	Refine the donor development program. Conduct fund development training for board and staff. Develop comprehensive fund development plan
Perspective: People and Learning			
Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.	<i>The board operates at a level necessary to meet the evolving needs of the Center.</i>	Board is actively engaged in fund development and fundraising. Nonprofit best practices are deployed at the administrative and board levels. Budget reflects commitment to professional development for staff and board. Board demonstrates its commitment to its development.	Board refines its recruitment, onboarding and development policies and processes. Board budgets for and establishes professional development plans for all members. Board conducts annual self assessments to track progress

Monitoring and Evaluation

There are four primary purposes for monitoring and evaluation of the plan:

- To integrate the plan into the work of the Center
- To facilitate discussion and ensure adequate resources
- To adapt and adjust, as necessary
- To report progress to your customers and stakeholders

Your facilitators recommended an approach to monitoring/evaluating that is intended to fold into existing patterns of tracking and reporting. For example, at the departmental level actions related to a particular strategy will be deployed. Based on the measure of success expected of that strategy or action, staff will track its progress. This information will be included in its normal reporting structures and will flow upward to the executive director. The executive director will include progress reports within her normal reporting to the board. The board will determine the frequency at which it will evaluate the progress of the strategic plan, including the progress of its own goals. Over time, the implementation of the strategic plan and monitoring and evaluation will become normalized.

The session concluded with an overview of the planned, next steps:

- Board's role
 - Affirm and adopt the plan
 - Determine frequency of monitoring and evaluating
 - Use the plan to guide decision-making

-
- Staff's role
 - Prioritize strategies for each goal
 - Craft action plans for each 12-18 month strategy
 - Determine reporting processes – internal and external
 - Report progress to the board (and stakeholders)
 - EVERYONE
 - Commit to the plan for one full year
 - Adapt and adjust as necessary

The Hillsdale County Senior Services Center is a well-established, successful organization. The recent change in leadership at both the executive and board levels provides an opportune time to gain clarity and agreement about the future direction of the organization. This strategic plan, guided by data and informed by the staff (subject-matter experts) and the board members (professional and well-connected to the community) serves as a roadmap that will ultimately lead the Center to its desired future state.

Appendix A

PowerPoint – Planning Session I

Summary of Community Survey Data

Stakeholder Interviews Summary

Staff Survey Summary

Board Survey Summary

Region II Area Agency on Aging Community Needs Survey Results

Community and Stakeholder Data Highlights

Current State-Future State raw data

Appendix B

PowerPoint – Planning Session II
Draft Strategic Plan – Consolidated
Mind Map – Pool Discussion/Exercise

Appendix C

PowerPoint Presentation – Planning Session III
Results of Strategy Development Session
Strategy Action Plan template

Appendix D

PowerPoint Presentation – Board Presentation

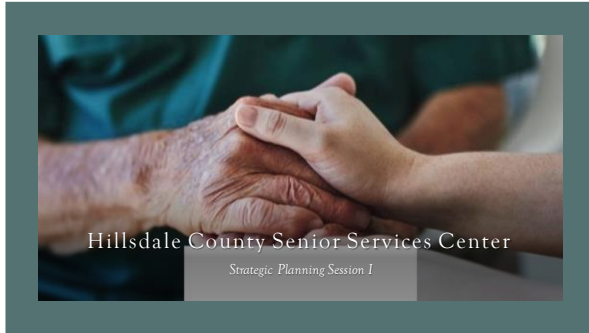
Administrative Goals Summary

Final Strategic Plan – Consolidated

Revenue Evaluation Matrix template

Appendix A

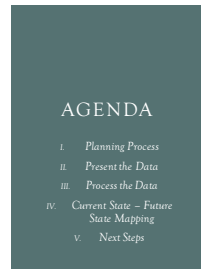
1. PowerPoint – Planning Session I
2. Summary of Community Survey Data
3. Stakeholder Interviews Summary
4. Staff Survey Summary
5. Board Survey Summary
6. Region II Area Agency on Aging Community Needs Survey Results
7. Community and Stakeholder Data Highlights
8. Current State-Future State raw data

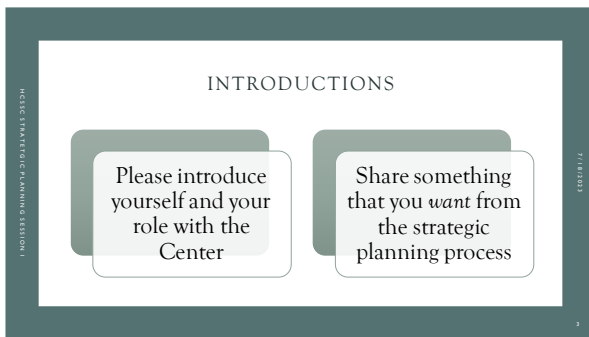


1



2





3

INCLUSION ACTIVITY
15 minutes

Step 1: Pair up - preferably one staff member with one board member

Step 2: Interview one another with the following questions:

- *What attracted you to join the Hillsdale Senior Center?*
- *What keeps you engaged?*

Step 3: Next, share with your partner a story of a time when you felt the proudest of, or the most connected to the work of the Center.



27/10/2023

4

4

[illegible]

5

[illegible]

Why Plan?

To define the future vision
for the Center.

To provide guidance for decision-making.

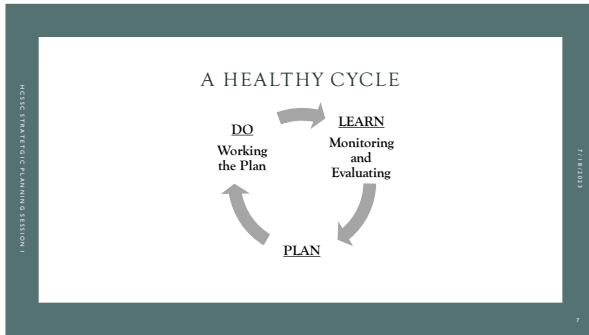
To ensure everyone is
"paddling in the same
direction".

To establish how results and success will be measured.

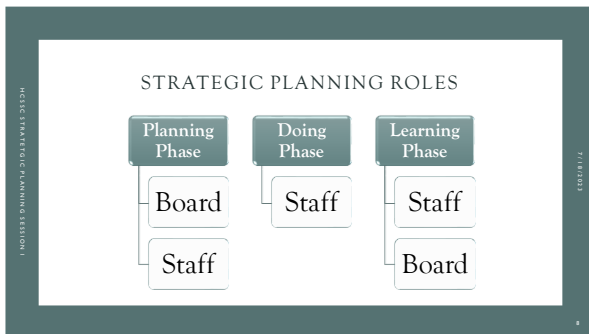
2016/2017

4

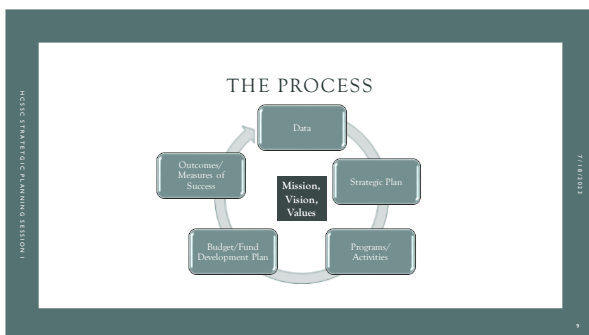
6



7



8



9



10



11

DATA SOURCES

Community Data	Stakeholder Data	Board and Staff Surveys
- MDHHS Aging & Adult Services Agency State Plan FY2021-2023 2022 BHHSJ Health Department Annual Report 2022 Community Action Agency Community Needs Assessment 2022 HHBdelle Community Health Center Assessment - Region II Area Agency on Aging 2022 Community Needs Assessment	- Number interviewed: 18 - Timeframe: June 9-29, 2023 - Stakeholder affiliation: - Nonprofit Org. - 4 - Governmental Agency - 4 - Client - 4 - Caregiver - 3 - Volunteer - 3	- Staff survey included workplace culture assessment and visioning questions - Board survey included board culture assessment and visioning questions

12

HCSIC STRATEGIC PLANNING SESSION I

GENERAL DATA ABOUT HILLSDALE COUNTY

- The 2022 population is estimated at 45,792 (*relatively stable since 1970*)
- The percentage of residents aged 65 or over is 20.7%
- Median household income is \$54,110 (state average is \$63,498)
- Households in poverty is 14% (state average is 13%) *Hillsdale County is not the poorest county in the state. That honor belongs to Isabella County whose poverty rate is 23.4%.*
- Labor Force Participation Rate is 56% (state average is 61%)

7/18/2023

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HCSIC STRATEGIC PLANNING SESSION I

COMMUNITY DATA INFORMATION PROCESSING

Step 1

- On your tables - find the **Community Data** handout
- Individually, review the summary and highlight what is important or what stands out to you

Step 2

- Share and discuss your highlights with your table
- Identify what stood out for you and why

Step 3

- As a group, identify 3-4 key highlights that you believe to be *important for the future of the Center*
- Record your highlights on the flip chart

30 Minutes

7/18/2023

14

BREAK - 10 MINUTES



15

STAKEHOLDER INTERVIEWS



Important source of feedback from those familiar with the Center



Questions designed to assess what is perceived as special and of value



Opportunity to learn where improvements might be made and what to focus on for the future

16

STAKEHOLDER DATA INFORMATION PROCESSING

Step 1

- On your tables - find the **Stakeholder Interview Summary** handout
- Individually, review the summary and highlight what is important or what stands out to you

Step 2

- Share and discuss your highlights with your table
- Identify what stood out for you and why

30 Minutes

Step 3

- As a group, identify 3-4 key highlights that you believe to be *important for the future of the Center*
- Record your highlights on the flip chart

17

BREAK - 10 MINUTES

During the break, take some time to review the results of the data processing activities.



18



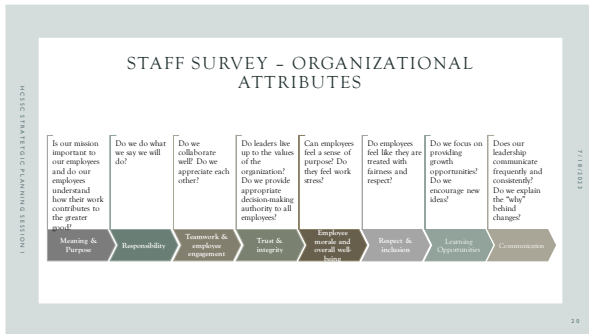
Gallery Walk

*What did you notice
about the results of
the data processing
activities?*

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19

19



20

HCSS: STRATEGIC PLANNING SESSION 1

ORGANIZATIONAL ATTRIBUTES RESULTS

Attribute Categories	% of "Strongly Agree" and "Agree" responses
Meaning and purpose	99%
Responsibility	88%
Teamwork and employee engagement	83%
Trust and integrity	82%
Employee morale and overall wellbeing	78%
Respect and inclusion	76%
Learning opportunities	76%
Communication	71%

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21

21

HCSIC STRATEGIC PLANNING SESSION I

STAFF SURVEY SUMMARY

Culture is the foundation and embodiment of an organization. When Hillsdale County Senior Services Center employees were prompted, "Our mission and values are important to me," 100% of respondents answered either "strongly agree" (76%) or "agree" (24%). Members of the Center team are not just completing tasks – they are working toward an important goal, outlined by the mission. And this solid foundation is evident across the board.

Staff in large part, appear to work together well as teams and across teams, trust each other and feel good about their work; they have a sense of purpose. They feel they are respected and provided opportunities for growth.

Indeed, a positive and collaborative work environment, where team members are comfortable and satisfied with their job and leadership, translates into better service for consumers. This is borne out in the stakeholder interviews where responses were overwhelmingly positive about the Center.

7/18/2023

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HCSIC STRATEGIC PLANNING SESSION I

BOARD SELF-ASSESSMENT

A board assessment process can help board members:

- Reflect on their experience
- Explore how comfortable, enjoyable, and meaningful participation on the board is to the board member
- Understand individual expectations for preparation time, and how decisions are made
- Identify different perceptions and opinions among board members about the board's role
- Identify and remove obstacles to increased board effectiveness

7/18/2023

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HCSIC STRATEGIC PLANNING SESSION I

BOARD SURVEY – BOARD CULTURE

Strongly Agree/Agree

- I am clear about my responsibilities as a member of the board.
- It is clear to me how the board will be involved in important decisions
- I receive financial information that is understandable and gives me a clear sense of the organization's financial position
- I receive information about the organization's services that allows me to understand the impact the organization is having.

Where the responses diverge

- I feel that other board members listen to my opinions and that I can comfortably disagree with another member.
- The board sets resource development goals and actively supports fundraising and resource development efforts.
- The board sets explicit performance measures for the executive director and evaluates performance against these measures.
- The board sets clear goals for its performance that are realistic and relevant to the strategic plan.

7/18/2023

24

VISION FOR THE FUTURE - COMMON THEMES FROM BOTH BOARD AND STAFF

Financial	• Increase in stable/unrestricted funding • Fund development plans for big ticket items
Customers/ Stakeholders	• More clients accessing programs and services • Ability to meet customer demand/no waitlists for services
Internal Assets	• Finalize plan and develop senior housing • Improved internal communication processes
People and Learning	• Reduced employee turnover rates • Increased board cohesion and performance

25

[illegible]

What thoughts
might you be
holding? What
questions might
you have?

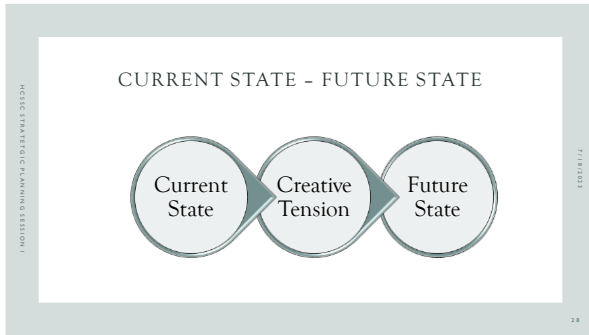


26

A green frog puppet, resembling Kermit the Frog, is standing on a paved surface. It is holding a blue mug with a white handle in its right hand and a small, light-colored rectangular object in its left hand. The frog is wearing blue sneakers with white laces. In front of it is a black sign on a white stand that reads "Have a Break" in white cursive. The background is a plain, light-colored wall.

27

[illegible]



28



29

CURRENT STATE REFLECTION 20 MINUTES

PURPOSE

To document and reflect on the current reality to ensure that everyone is working from the same pool of information.

PROCESS

For each of the four perspectives, reflect on what currently exists.
What do we know to be true?
What is the current reality?
Where are we now?

CHART RESULTS

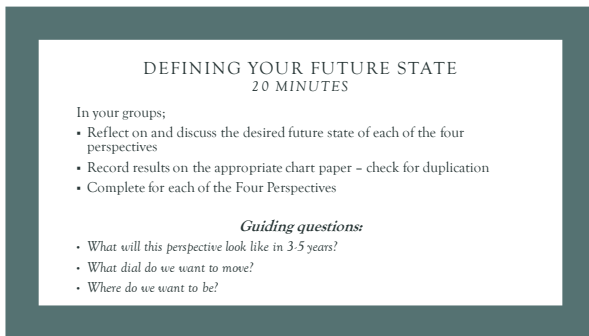
Canvas! Work in groups. Record your results on the appropriate chart – check for duplication. Rotate when directed.



30



31



32



33

WRAP UP



Reflect individually, then
share with the group:

- Something that you got from this session

34



35

HCSSC Strategic Planning – Community Data

According to the 2020 U.S. Census, 1 in 6 people in the U.S. were aged 65 and over. The U.S. population age 65 and over grew from 2010 to 2020 at the fastest rate since 1880 to 1890 and reached 55.8 million, a 38.6% increase in just 10 years.

Michigan is aging, and fast. The state has more than 2 million residents over age 60, representing about 25% of the state's population, and 37% of Michigan residents are 50 and older. Michiganders 85 and older are the fastest-growing age group of all. The state also has one of the top 15 oldest populations in the U.S. The statewide poverty rate is lowest for seniors (65 and older) and the poverty rate for adults 18 to 64 years old is 22%.

When considering how well states are positioned to care for their aging populations, the AARP designates eight "age-friendly everything" domains of livability: outdoor spaces and buildings, transportation, housing, social participation, respect and social inclusion, work and civic engagement, communication and information, and health services and community supports. The domains ultimately support older adults aging in place in their homes and communities.

Michigan's total index score for livability is 50, ranking our state as average. Michigan falls firmly in the middle tier in terms of rank within all categories: opportunity, environment, housing, engagement, transportation, neighborhood, and health. Priorities in the 2021-2023 plan address areas with the biggest room for improvement, including addressing the direct care worker shortage, care transition programming to reduce hospital readmission, expanding access to evidence-based programming to reduce obesity, and strategies to increase social participation.

Michigan Department of Health & Human Services/Aging & Adult Services Agency State Plan on Aging FY2021-2023

Goal #1:

Expand the reach of information and awareness of aging network services, ensuring all older adults and caregivers can access culturally and linguistically appropriate information and have awareness of quality services where and when they need them.

Goal #2:

Prioritize resources to promote social interaction and connectedness, including expanding access to technology and transportation.

Goal #3:

Increase the number of well-trained, qualified, and supportive multicultural direct care workers through collaboration by elevating the workforce, improving retention, promoting its collective value, and supporting opportunities to increase wages.

Goal #4:

Leverage programs, services, and resources to ensure older adults have the opportunity to make their own decisions and enable them to age in place.

From the 2022 Branch-Hillsdale-St. Joseph Health Department Annual Report

Hillsdale County has the highest percentage of residents over the age of 65 at 20.7%

The leading cause of death in Hillsdale County is Heart Disease at 20.2% with cancer next at 17.6% and COVID-19 at 16.5%. All other causes fall below double-digits.

Snapshot of Key Community Conditions and Trends

- Diverging trends in population within the last four years. Jackson and Hillsdale show small population reductions, Lenawee has been increasing.
- Decreased general trend in poverty rates. Poverty rates have decreased over the last several years across counties overall and for children under 18 and under 5.
- A recovering local job market. The number of jobs across all three counties have rebounded but are still lower than pre COVID-19 pandemic levels. Unemployment rates are still higher as well and are much higher for Jackson City compared to the other county seats and counties.
- Household income increases. Median household income continues to increase both in real and constant dollars.
- Mixed educational outcomes. High school dropout rates continue to decrease over time across counties, however, almost 70% of the population across counties do not hold a degree (associate's, bachelor's, or graduate).
- Housing value and cost increases. Homeowners are seeing increased values but relatively stable mortgage costs. However, renters are seeing increases in rent and a decrease in rental vacancy and availability.

Priority Needs Assessments: Responses by age vary the most on customers' priorities. Most priorities tend to follow age trends regarding different priorities in different seasons of life. Higher rates of CAA customers younger than 24 selected health insurance (58.8%) than the proportion of all other age ranges, including 70 years and older (55.9%). Customers aged 24-44 prioritize buying a home (41.0%) and having good credit (35.0%) more than having health insurance (31.6%). For CAA respondents aged 55 to over 70, having health insurance ranked as number one, with good credit in 2nd place and better wages coming in third place.

Transportation

Good public transportation was identified as missing in the community by at least one in five residents each year from 2019-2021, an increase compared to the prior four years of data collection. Hillsdale residents reported this at the highest rate in 2019 and 2021. In 2020 only 14.2% of Lenawee residents said good public transportation was missing and that same year 38.9% of Jackson residents identified public transportation as missing. Response rates from 2021 were more comparable to 2019 rates across county and collectively.

Consistent with root cause survey responses by county, and the priority of 'reliable transportation,' for CAA customers, Public Transportation is also identified as missing in their community as a consistent proportion of survey respondents in all counties over time. The perceived deficit is led by Hillsdale respondents.

For transportation needs, all groups talked about the need for **more options for transportation** within the community in terms of extended hours and locations for the Dial-A-Ride service, as well as providing additional options like buses, taxis, or Uber, and providing transportation services to rural areas.

Affordable Housing

Affordable housing was the most valued housing component in 2021 and 2022 increasing each year since 2018. Safe streets had trended upwards from 2013 to 2018 but decreased from 63.7% in 2019 to 53.1% in 2021 below previous levels. There has been a small increase in the percentage identifying the need for buildings in good repair in each year from 2018 through 2021 to a high of 13.1% this past year.

The majority of Jackson residents selected safe streets. Hillsdale County clients valued affordable housing and good paying jobs at a higher rate than clients from any county continuing trends from the 2019 report. Lenawee clients prioritized responsible neighbors, good public transportation, and buildings in good repair at higher rates than did clients from other counties.

All groups talked about there being **an affordable housing shortage** in terms of housing needs, with some groups specifying that rental housing or housing specifically for larger families is needed.

Region II Area Agency on Aging – 2022 Community Needs Survey

816 responses of which 170 were from Hillsdale County

What do you believe are the biggest hardships faced by seniors and adults with disabilities in your community?

- | | |
|--|-----|
| • Loneliness and isolation | 506 |
| • Lack of transportation options | 390 |
| • Lack of safe, affordable, and accessible housing | 271 |
| • Lack of affordable in-home care | 270 |
| • Insufficient access to healthy foods | 147 |
| • Inadequate medical care | 134 |
| • Abuse, neglect and exploitation | 126 |

From the 2022 Hillsdale Community Health Center Assessment

Respondents aged 65 or over accounted for 28.2% of the survey sample compared to their 20.2% presence in the general population. This is consistent with the results of previous assessment surveys. Respondents aged 65 or older represented 30.4% of the survey samples in 2019 and 32.5% in both 2016 and 2013.

A comparison of population estimates for Hillsdale and Michigan by age groups reveals:

- The age group 0 to 18 has been increasing.
- The age group 18 to 65 has been decreasing.
- The age group 65+ has been increasing.

This trend, if it continues, will have an impact on the health and economic needs of the community. According to the American Association of Retired Persons (AARP), the number of people in the US age 65 is more than 43 million. This number is expected to grow to 83 million over the next four decades. If a comparable increase occurs in Hillsdale County, this will have a serious impact on the local healthcare system.

Homelessness is a concern for the Human Services Network, Hillsdale's collaborative body. Student homelessness is often hidden since they may seek shelter with relatives or friends rather than public areas. The Kids Count in Michigan 2021 reported 403 (7.1%) students in grades K-12 were homeless in Hillsdale compared to 2.1% in Michigan in 2020.

Lack of affordable housing is a major cause of homelessness. Respondents in the 2022 CHNA survey were asked how concerned they were about affordable housing. Of the 680 who answered this question:

- 304 (44.7%) said they were very concerned.
- 274 (40.3%) were moderately concerned.
- 102 (15.0%) were not at all concerned.

Healthcare

The Health Resources and Services Administration (HRSA) determines if there is a Health Professional Shortage Area (HPSA) based on population, area geography, facilities available and other criteria. In order to address the HPSA designation of Hillsdale as a Health Professional Shortage area for Dental, Mental Health and Primary Care, Hillsdale Hospital has consistently attempted to recruit new Primary Care as well as medical specialists to the area.

Hillsdale County has several HPSA designations:

- Primary Care Rural Health Clinics
- Mental Health
- Dental Care
- Medically Underserved Area/Population – Entire County

Caregivers

The CHNA 2022 survey asked respondents if they were caregivers for any sick or aged person. Of the 715 people who answered this question:

- 89 (12.5%) said they were. Of these, 74 were women.
- 626 (87.6%) were not.

A follow up question was asked about how respondents would rate the healthcare service or support for elder care in Hillsdale County.

Of the 89 who said they were caregivers, 87 answered this question:

- 8 (9.2%) said it was excellent.
- 23 (26.4%) said it was good.
- 22 (25.3%) said it was adequate.
- 28 (32.2%) said it was insufficient.
- 6 (6.9%) said it did not apply to them.

A total of 704 people rated the support for elder care in Hillsdale County though only 89 had claimed to be caregivers. Perhaps some of them were previous caregivers or had a friend or relative that was in this position. Of the 612 who were not caregivers and answered this question:

- 5 (8.2%) said the support was excellent.
- 187 (30.6%) said it was good.
- 117 (19.1%) said it was adequate.
- 70 (11.4%) said it was insufficient.
- 188 (30.7%) said it did not apply to them.

Hillsdale County Senior Services Center Stakeholder Interview Summary – June 2023

“They are excellent at meeting their clients where they are at – a true client centered approach. They provide excellent services and a community for folks.”

“What do they do best? They have the seniors’ backs.”

(Stakeholder Interviews, 6/26/2023)

Background

In early February 2023 the Center entered into an agreement with a team of consultants/facilitators to assist with a strategic planning process that will guide the board and staff in exploring and determining the future of the organization. The plan is expected to define a future vision for the organization, refine and organize priorities, and establish annual goals for the next 3-5 years. The planning process will include multiple steps: analysis of community needs data; conducting stakeholder interviews; administering online surveys of the Board and staff; and onsite processing/meetings with the Board and staff.

Stakeholder Interviews: The Board and staff generated a list of 30 stakeholders from various sectors – social services agencies, elected officials, donors, clients, caregivers, and volunteers - to be invited to participate in the stakeholder interviews. An introductory email was sent by Maggi informing the stakeholders of the process and asking for their willingness to participate. After the introductory email from Maggi, the consultants reached out to each of the 30 to schedule interviews. Several stakeholders of the original list did not respond to multiple attempts. Ultimately 18 were included in the interviews.

The interviews took place throughout June and were conducted by phone. The stakeholders reported having a variety of relationships with the Center; some had long-standing personal relationships, using Center services on a regular basis, others had ongoing professional relationships as in service/community partners.

Summary

General Perceptions: Regardless of their length or depth of relationship with the Center, respondents **unanimously** complimented the Center on its excellent services. Perspectives only differed according to which services they were familiar with, some emphasizing the friendliness of staff (“they always have a smile”), others the knowledge and helpfulness of the fitness center staff, and still others the intuitive care provided by the care givers in their day programs.

What does Hillsdale County Senior Services Center do best? Respondents were hard pressed to identify a single thing that the Center does “best”. Many said “everything” – the staff, Meals on Wheels, hot meals at lunch, activities that build community and provide stimulation for area seniors, respite day program, education on medical and other insurance issues, fitness center and fitness classes.

What is unique? “All of their services and activities they provide that no one else does. These are all unique and they excel in providing them.” This was the prevailing sentiment.

New market niches or community gaps that the Center could fill? There were two needs areas mentioned most frequently. The first, and the most often mentioned, was the need for additional transportation options, for example on medical-related transport for folks out-county. The second was the need for services for the homeless of Hillsdale County and speculation regarding how the Center might help address this community need.

Opportunities for the Center to improve? The two most often mentioned areas for improvement were related to marketing. First, the need for broader/more professional marketing of the Center’s services, and second, the need to realize and capitalize on the upcoming tide of baby boomers who can benefit from their services.

Themes and Quotes

1. **The Hillsdale County Senior Services Center, a private non-profit organization established in 1983, is "Growing to Serve." The Center is a place where older persons meet to pursue mutual interests, receive services and take part in programs and services which will enhance their dignity, improve their health, support their independence, and encourage their involvement in the community. In your opinion, what do they do better than anyone else? In what way?**

Themes:

- Staff are amazing; knowledgeable, caring, responsive
- They provide community for seniors
- Fitness center is state of the art and staff are very helpful/skillful
- They are willing to try innovative programming; take suggestions from their clients and try to accommodate them
- The environment is so "homey" and welcoming

Quotes:

- "They are good at meeting their clients where they are at – a true client centered approach. They provide excellent services and a community for folks."
- "The kitchen staff is so friendly and competent. They fix wonderful, hot meals with a smile. Then after finished serving, they often come out to visit with folks. They seem to know everyone's name."
- "They have an excellent Meals on Wheels program; they run an exemplary program. Sets a high bar for other similar organizations doing similar work. Also do great work in encouraging and supporting seniors in staying active – especially thru the Fitness Center. Also impressed with the respite program (especially the overnight option) – is a very special program that may not be offered by other senior centers."

2. **Are any of the services/products that the Center provides unique?**

Themes:

- The organizer of most in-home services for rural and disabled seniors.
- Their overall facility and everything that is offered
- The social connections that are forged through their programs
- They offer intergenerational programming
- Overnight respite care
- Breadth of programming
- Very robust volunteer support
- Trust – totally trust that my loved one will be respected and cared for
- Certified as an emergency shelter

Quotes:

- "The Center is the hub for all things senior-related."
- "Meals on Wheels with a fantastic volunteer base; not only the food, but the wellness checks that are included. Staff would fill in if a volunteer couldn't make or helped out in the kitchen. The staff model was very much an "all hands-on deck" culture. You put your job on hold if there was a need elsewhere to serve clients."
- "I can trust the staff to be good to my Mom and take excellent care of her. They show you from the minute you walk through the door that they want you there."
- "I have visited many workout facilities in my time and this one is by far the best. There is always a staff person present to answer questions, give tips on how to do different exercises or to tend to supplies."

3. Are there any particular new market niches or community gaps that you think the Center could/should fill?

Themes:

- Transportation; no countywide system, and no public transportation other than Dial-a-ride in the city of Hillsdale
- Affordable housing for seniors
- Participating in some way to address the homelessness crisis

Quotes:

- “Transportation. Huge issue. I would like to see their transportation coordinator work with DHHS to solve transportation for people outside of the Center’s age restrictions. If transportation can be solved for seniors, it can be solved for everyone. How can everyone involved in providing services come together to solve the problem?”
- “We really need housing for low-income folks in this county. Maybe they could somehow participate in making that happen – not by developing housing, per se but partnering with those who do.”
- “The homelessness issue is really bad in Hillsdale Co. There are services available but not nearly enough for the need. The Center allows them to shower and gives them personal needs products. There are various pastors/congregations in the area who are trying to help but so much more is needed. Especially in cold weather the homeless folks are desperate. “

4. What might be some opportunities for the Center to improve and how?

Themes:

- Center could market their services more broadly and effectively
- Keep in mind the changing demographics of “seniors”; develop programs and messaging with the upcoming baby boomer population in mind
- Complete the housing project
- Make it easier for more people to access programs such as Meals on Wheels and other Center services
- Continue to seek out partnerships and best practice to emulate

Quotes:

- “There are a lot of us baby boomers who are retiring and needing services and community. The Center needs to get the word out about their beautiful facility and all the fantastic services they provide. I would be willing to volunteer to help them with their marketing.”
- “Generally, the idea of who is a senior continues to evolve. The “new” generation of seniors have different needs and expectations, and the Center should always be aware of these differences. How is marketing targeted specifically to Baby Boomers, versus the WWI generation? How is messaging, programming, etc. adapted to the difference in beliefs and perceptions of this newer senior population?”
- “The biggest and best opportunity for improvement is the senior housing that is proposed. It will be so wonderful if they can finally complete the project. To have housing so near to the center will just be perfect!”
- “More collaboration with AAA and other centers in nearby counties – looking to other centers for optimal practices and programming. What are other high-performing centers doing that could be implemented in the county. There is room for the Center to not feel threatened by other organizations, rather see them as partners or collaborators.”

5. We have experienced many political and social changes in recent years. What do you see in our political/social forecast? How might that influence the work of the Center?

Themes:

- The growth of the aging population is rapidly increasing. How might the Center ensure that it is prepared to serve more clients?
- Maintaining and diversifying funding; paying attention to charitable giving forecasts
- Chronic disease is an important issue; there is a need for agencies to promote screenings and encourage healthy lifestyles
- Prove your value; keep county commissioners aware of the excellent services the Center provides to their constituents
- Pay attention to demographic trends and market and develop programs accordingly

Quotes

- “The uncertainty of future funding. State and federal budget instability. It seems that the senior population isn’t a priority. The Older Americans Act is up for review right now and could seriously impact future funding. Being aware of those things and being actively engaged in advocacy at both the state and federal levels.”
- “Just completed a Community Health Improvement Plan – flagged chronic disease as an important community health need/issue. I know (the Center) offers an annual health fair that the Health Dept. participates in. I don’t know how well-attended the fairs are. But could the Center do more work to promote health screenings to help address undiagnosed chronic health issues. Could the Center do more to address this?”
- “It seems that so many of the Center’s clients are in their eighties and above. How are they ensuring that they appeal to all seniors – not just those eighties and above? I think the pool would be a good addition.”

Hillsdale County Senior Services Center: Staff Survey

July 2023

"The sincere dedication so many staff exhibit is what makes our mission feel real and attainable."

Staff survey

Background

The Hillsdale County Senior Services Center (HCSSC) online staff feedback survey was conducted between June 6 – June 16, 2023. The survey was introduced to staff by the Executive Director, Maggi Monroe, who sent an email to all staff (44) describing the reason for the survey and asking for their participation. The survey garnered a 66% response rate, above average for online surveys. The survey included 35 questions; 31 close ended questions using a 5-point Likert scale from Strongly Disagree to Strongly Agree; and four open ended questions.

The survey was crafted to gather feedback regarding specific aspects of the HCSSC organizational culture. Organization culture is a significant part of the employee (and customer) experience, and the strategic planning process presented the organization a perfect opportunity to step back and assess the culture of HCSSC. The best organizations understand their workplace culture and take careful steps to manage and promote it effectively. It is important to analyze an organization's culture by gathering feedback from employees to see how aligned they are with the current and/or desired culture. One way to do this is to define the desired attributes of a strong culture and then measure them through an employee survey.

Current literature defining desired attributes of a strong culture for a nonprofit organization such as Hillsdale County Senior Services Center cluster these attributes in the following categories:

- **Meaning and purpose** – Is our mission important to our employees and do our employees understand how their work contributes to the greater good?
- **Responsibility** – Do we do what we say we will do?
- **Teamwork and employee engagement**– Do we collaborate well? Do we appreciate each other?
- **Trust and integrity** – Do leaders live up to the values of the organization? Do we provide appropriate decision-making authority to all employees?
- **Employee morale and overall wellbeing** – Can employees feel a sense of purpose? Do they feel work stress?
- **Respect and inclusion** – Do employees feel like they are treated with fairness and respect?
- **Learning opportunities** – Do we focus on providing growth opportunities? Do we encourage new ideas?
- **Communication** – Does our leadership communicate frequently and consistently? Do we explain the "why" behind changes?

Survey Results

Closed-ended questions: Survey results are reported based on averages of participant responses in the attribute categories listed above. Percentages are a combination of the "strongly agree" and "agree" answer choices.

Attribute Categories	%
1. Meaning and purpose	99%
2. Responsibility	88%
3. Teamwork and employee engagement	83%
4. Trust and integrity	82%
5. Employee morale and overall wellbeing	78%
6. Respect and inclusion	76%
7. Learning opportunities	76%
8. Communication	71%

Open-ended questions:

1. What are the qualities or characteristics we want for our agency but **don't have**?
 - Communication to all about current and upcoming events

- Security – one person closing is not safe
 - Better financial transparency with the public.
 - A way to transport clients in wheelchairs
 - Worker retention
 - Trust and respect between all leadership team members and how individually our positions enhance and strengthen the overall success of Center.
2. What are the qualities or characteristics we already have and want to **keep**?
 - Positive attitudes
 - A place clients love to come
 - Wonderful meals and meals on wheels
 - We are dedicated and caring
 - Providing quality services
 - Friendly, welcoming and helpful
 - Staff mesh well and are always helpful and positive with each other and the clients
 - Everyone is always ready to lend a helping hand and have each other's backs
 - An amazing family atmosphere
 - Genuine desire to be true to our mission
 - Employees feel they are part of a team
 3. What are the qualities or characteristics we don't currently have and **don't want in the future**?
 - Negative and untrue rumors
 - Allow facility to get run down
 - Bad attitudes
 - Becoming more corporate
 - Employee conflicts
 - Micromanaging and unclear expectations
 - The appearance that one department is more important than another
 4. Which, if any, of our current qualities or characteristics can we **do without**?
 - We are not a homeless shelter
 - Cliques in departments
 - Preferential treatment
 - Not seeking input of staff prior to decisions being made
 - Occasional stress caused by my job

Summary

Culture is the foundation and embodiment of an organization. When Hillsdale County Senior Services Center employees were prompted, "Our mission and values are important to me.", **100% of respondents answered either "strongly agree" (76%) or "agree" (24%)**. Members of the Center team are not just completing tasks — they are working toward an important goal, outlined by the mission. And this solid foundation is evident across the board.

Staff in large part, appear to work together well as teams and across teams, trust each other and feel good about their work; they have a sense of purpose. They feel they are respected and provided opportunities for growth.

Indeed, a positive and collaborative work environment, where team members are comfortable and satisfied with their job and leadership, translates into **better service for consumers**. This is borne out in the stakeholder interviews where responses were overwhelmingly positive about the Center.

Hillsdale County Senior Services Center: Board Survey July 2023

“My hope is for the Center to thrive in current services, to grow to serve more folks in a variety of ways and for the Board to FULLY support and grow the new director so that she can grow a staff that is nurtured and feels respected and as such will be equipped to care wholly for those that we serve.”

Background

The Hillsdale County Senior Services Center (the Center) online board survey was conducted between June 16th and June 30th, 2023. Ten of twelve board members responded to the survey. The purpose of this survey was twofold. First, to explore the culture of the Center board through the lens of individual board members. The board plays a very important role, not only in the development and monitoring of the strategic plan, but of the overall governance of the Center itself. These questions were designed to assist your consultants in understanding the basic functioning of the board. The results will be used to guide the in-person planning sessions. The assessment questions enjoyed a 100% completion rate.

The second objective was to gauge the perspectives of individual board members relating to the future of the Center. Questions were open-ended to encourage the expression of individual thoughts, beliefs, hopes and dreams for the Center. Respondents were asked to consider such elements as overall size, activities, growth, and reputation in the community. These open-ended questions received a 70% completion rate.

The questions posed relating to the culture of the board reflect a selection of questions common in an annual board assessment. These include assessing board members’ understanding of their roles and responsibilities, quality of communication and information and attention to performance measures for both the executive director and the board itself.

Survey Results

The following survey results are based on averages of participant responses to closed-ended questions that required a response ranging from Strongly Agree to Not Sure or Cannot Rate answer choices.

Question	Strongly Agree/Agree	Disagree/Strongly Disagree	Not sure, or cannot answer
I am clear about my responsibilities as a member of the board.	100%		
It is clear to me how the board will be involved in important decisions.	100%		
I receive financial information that is understandable and gives me clear sense of the organization’s financial position.	100%		
I receive information about the organization’s services that allows me to understand the impact the organization is having.	100%		
I feel that the other board members listen to my opinions and that I can comfortably disagree with another member.	90%	10%	
The board sets resource development goals and actively supports fundraising and resource development goals.	60%	10%	30%
The board sets explicit performance measures for the executive director and evaluates performance against these measures.	60%	20%	20%
The board sets clear goals for its performance that are realistic and relevant to the strategic plan.	50%	20%	30%

In analyzing these results, we were looking for any potential board-related obstacles that might impede the progress of the planning process. Based on these outcomes, we did not perceive any red flags that required immediate attention. However, we encourage the board to consider the disparities in the responses to the last three questions. These statements reflect what you might expect from a board performing at a high level. One that is future-oriented and understands its roles relating to resource acquisition, its own ongoing development, and its responsibility to foster a professional and satisfying relationship with its sole employee – the executive director. It is our understanding that the

board has recently completed a comprehensive board assessment. It is our recommendation that the results of this survey be considered in alignment with the analysis of that assessment, and in the creation of any subsequent board development plans.

The following is a summary of the open-ended questions. These largely represent common themes in the responses, and include some singular responses where there is a lack of commonality:

1. What do you imagine the Center will look like in three or more years? What might be different? What might be the same?
 - Housing project completed or in process.
 - Continued growth in services, revenues, and community goodwill.
 - Reduction in or elimination of waiting lists.
2. As you envision the Center in the next 3-5 years, how will you know that it is successful?
 - Reduced turnover rates for board and staff.
 - Increases in clients served.
 - Increased satisfaction reported by both clients and staff.
 - Improvements in financial performance.
 - Housing project and pool project is completed or in process.
3. Please identify the things you would like the Center to *achieve*.
 - Expanded services that address unmet needs and are mission driven.
 - Broader reach/awareness of Center and its offerings.
 - Employer of choice.
 - Financial sustainability.
 - Attention to board development and cohesion.
4. Please identify the things you would like the Center to *preserve*.
 - All existing services.
 - Commitment to the senior community and our mission.
 - Staff cohesion and team culture.
5. Please identify the things you would like the Center to *eliminate*.
 - Lack of clarity of board roles/responsibilities.
 - Strained relationships with funders.
6. Please identify the things you would like the Center to *avoid*.
 - Excessive staff turnover.
 - Unintended consequences of strained relationships with funders.
 - Poor public opinion.
7. In your opinion, what is the most important things that needs to be done for the Center to rise to the next level of accomplishing its mission?
 - Commitment to implementing the new strategic plan.
 - Strengthening internal and external relationships in the best interests of the Center.

Summary

The overall results of the board survey are positive. There is agreement on several elements in the board assessment section of the survey, and commonality in the future-oriented section. Where results diverge may indicate some tension that may inhibit the board from moving to a higher level of functioning. The Center's board of directors is a classic governance board whose primary areas of focus are on financial stewardship, building and maintaining a professional and mutually satisfying relationship with the executive director, planning for the future and monitoring and evaluating progress toward the agreed-upon goals of the organization. When board members are passionate about the work of the organization they serve, it is easy to get bogged down in the weeds of day-to-day operations, which is the appropriate role of staff leadership. It is important to clarify and maintain the delineation between the roles of the board and the roles of staff. We have attached a best practice matrix that may be helpful as the board works to achieve the goals it has established for its own development and performance.

Region 2 Area Agency on Aging: Community Needs Survey

816
Responses

44:54
Average time to complete

Active
Status

1. What County do you live in?

Hillsdale	170
Jackson	421
Lenawee	216
Other	5



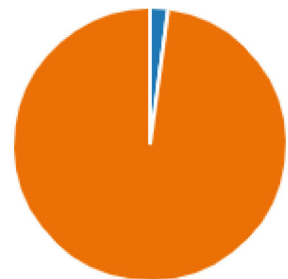
2. Please select the option(s) that most closely reflect your Gender Identity

Woman	571
Man	229
Transgender	1
Non-binary/non-conforming	3
Prefer not to respond	5

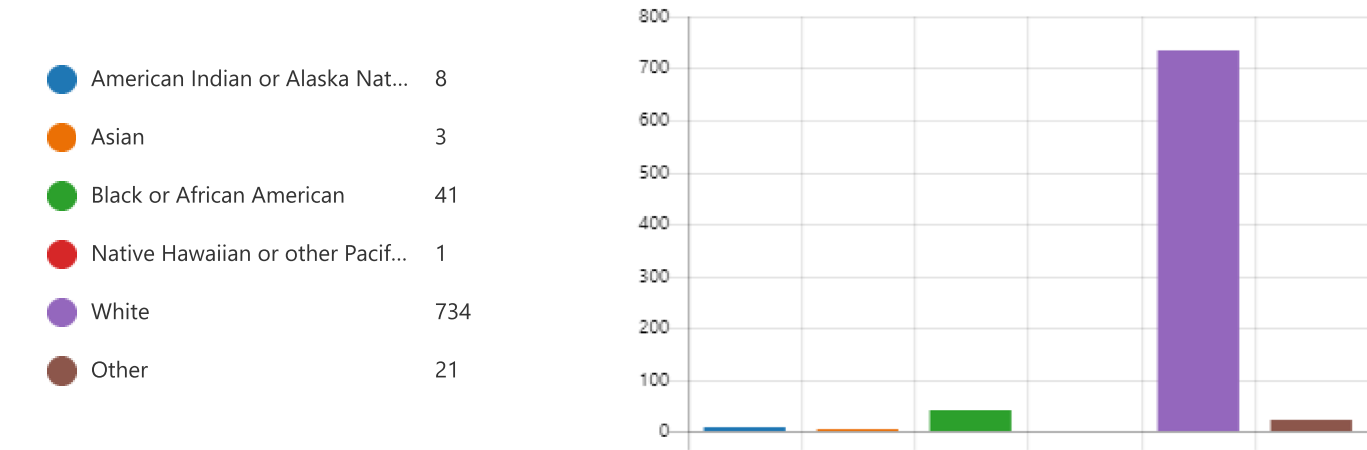


3. Are you of Hispanic, Latino, or of Spanish origin?

Yes	17
No	776



4. How would you describe yourself?



5. Primary Language

758
Responses

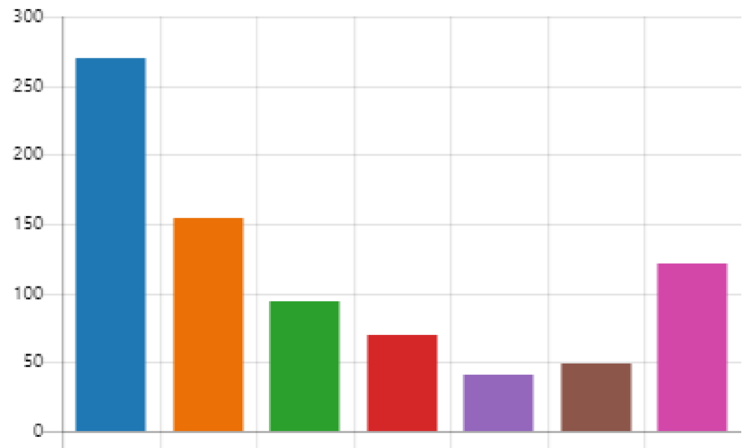
Latest Responses
"English"
"English"
"English"

746 respondents (98%) answered **English** for this question.

English AMERICAN ENGLISH
English-speaking

6. Household Income

Under \$20,000	270
\$20,000 to \$34,999	154
\$35,000 to \$49,999	94
\$50,000 to \$74,999	69
\$75,000 to \$99,000	41
Over \$100,000	49
Prefer not to respond	122



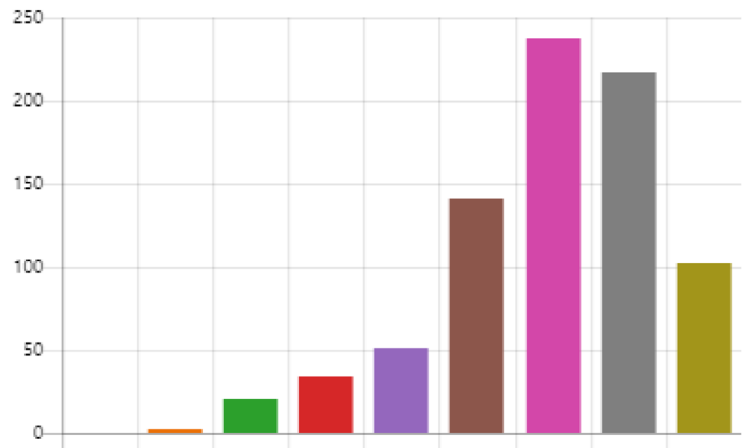
7. What is your marital status?

Single (never married)	88
Married, or in a domestic part...	316
Widowed	210
Divorced	187
Separated	7



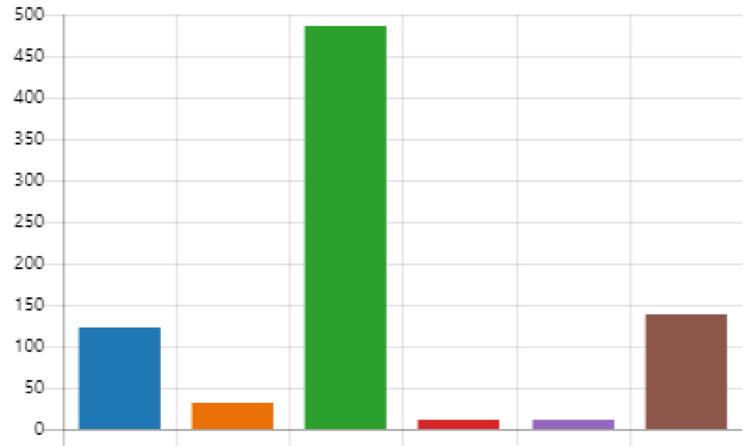
8. What is your age?

17 or under	0
18-24	2
25-34	20
35-44	34
45-54	51
55-64	141
65-74	238
75-84	217
85 or older	102



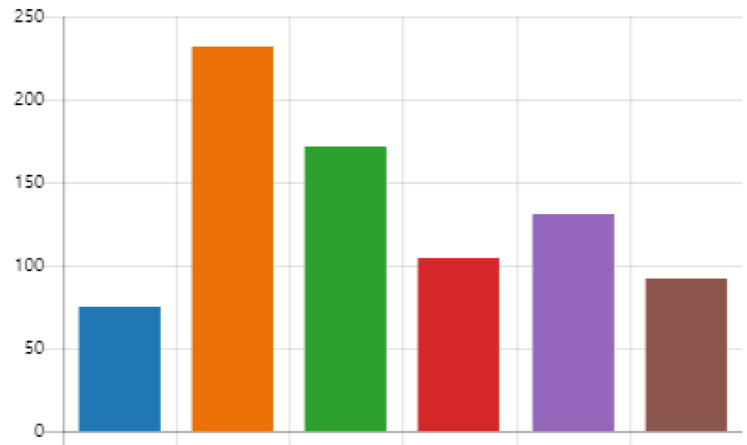
9. Please describe your employment status

Employed full-time	122
Employed part-time	31
Retired	487
Unemployed	12
Volunteer	12
Disabled or unable to work	139



10. What is the highest level of school you completed?

No high-school diploma	75
High-school diploma	232
Some college	172
Associate's degree or technica...	105
Bachelor's degree	131
Graduate degree	92



11. Have you ever served in the armed forces?

Yes	100
No	707

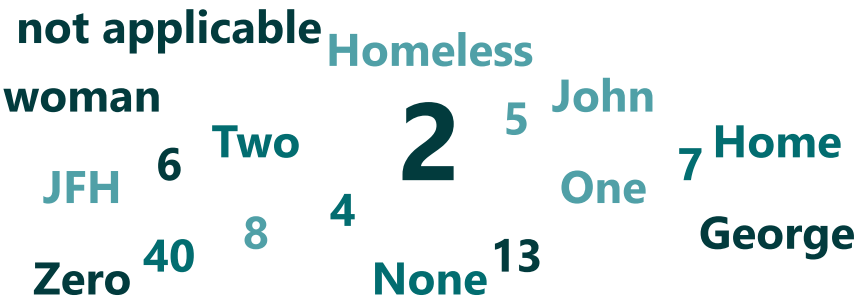


12. Including yourself, how many people live in your home?

766
Responses

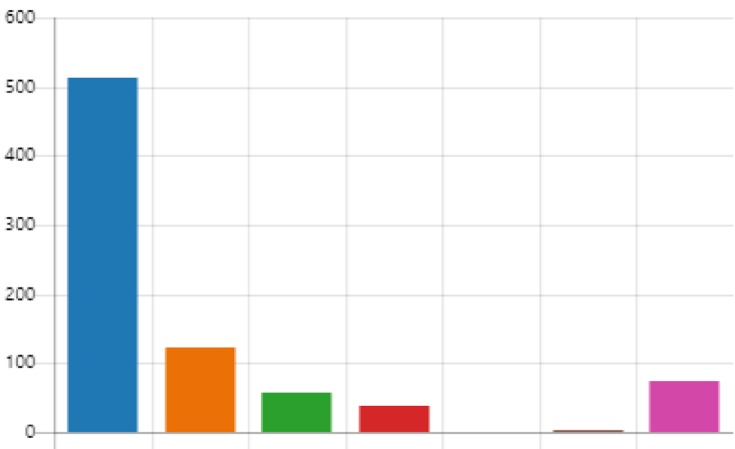
Latest Responses
"7"
"7"
"4"

266 respondents (35%) answered 2 for this question.



13. In what type of home do you live?

A home that I own	512
A home that I rent	124
Retirement community (rent o...	56
Assisted Living	38
Nursing Facility	0
Homeless, or displaced	3
Other	74



14. Which statement is true about the area where you live:

There are enough safe and aff...	335
There are enough safe housin...	170
There are enough affordable ...	24
There are not enough safe an...	215



15. Do you know where to go for help with housing issues?

Yes	442
No	176
Unsure	170



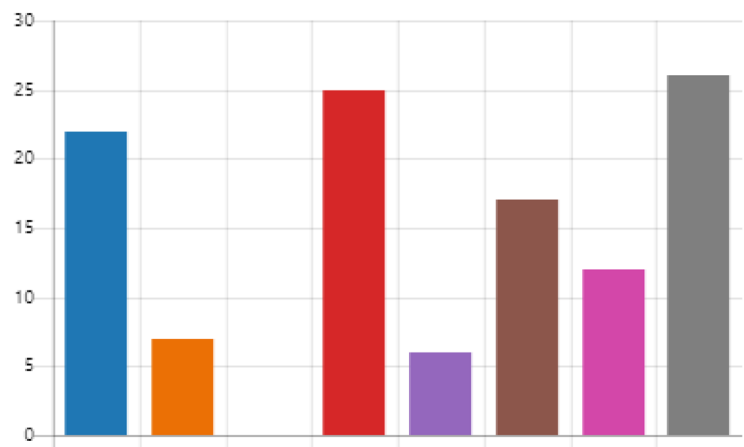
16. Are you satisfied with your current living arrangements?

Yes	713
No	53
Unsure	42



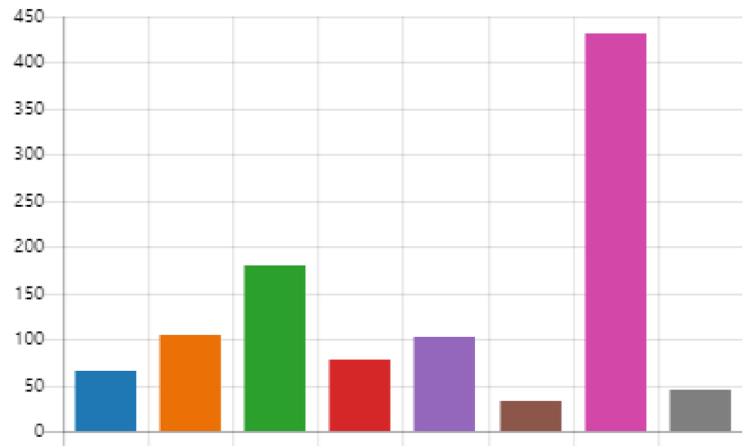
17. If not, please tell us why?

Home needs repairs that I can...	22
Landlord won't make repairs	7
Foreclosure concerns	0
Too expensive	25
Unsafe neighborhood	6
Too far from family, friends an...	17
Not accessible (too many stair...	12
Other	26



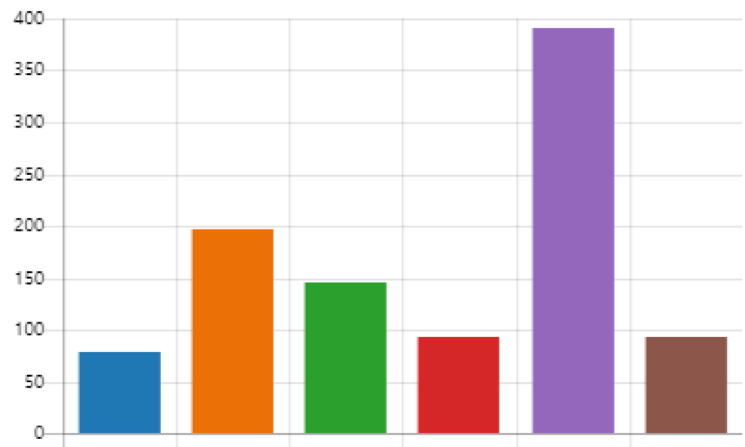
18. Which of the following have affected your ability to live independently?

It is not safe for me to be hom...	66
Mobility concerns (I need som...	105
I need help completing tasks i...	181
I need help completing perso...	78
Loneliness	103
Alzheimer's or dementia symp...	33
Not applicable	431
Other	44



19. What services do you rely on to continue living independently in your community?

Personal care (bathing assista...	78
Housekeeping (sweeping, dus...	197
Cooking (meal prep, grocery s...	145
Medication management (rem...	93
Not Applicable	391
Other	93



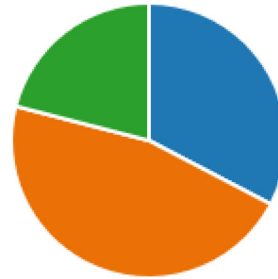
20. If you do rely on someone's help to live independently, are you receiving enough help meet your needs?

Yes	306
No	106
Other	89



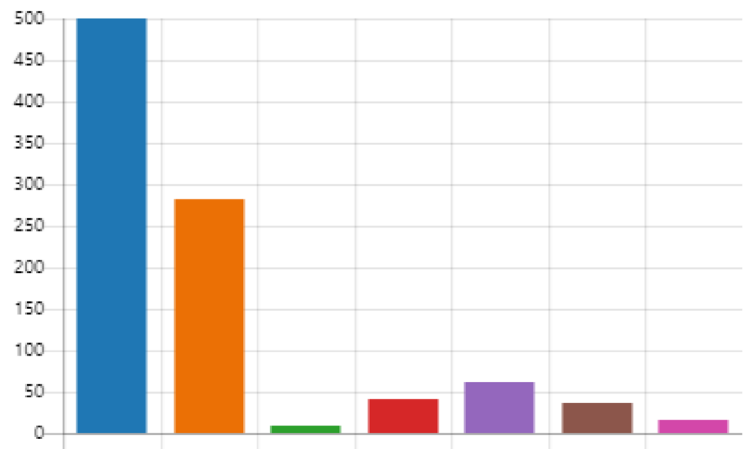
21. Do you believe there are enough transportation options to meet the needs of people living in your area?

Yes	260
No	369
Unsure	167



22. What method(s) of transportation do you use?

I drive myself	499
Someone else drives me	282
Taxi, Uber or Lyft	10
Transportation for seniors	42
Public transportation (dial-a-ri...	62
I walk	36
I am not able to get out	17



23. Are you able to get to the places you need to go (appointments, grocery shopping)?

Yes	699
No	47
Other	51



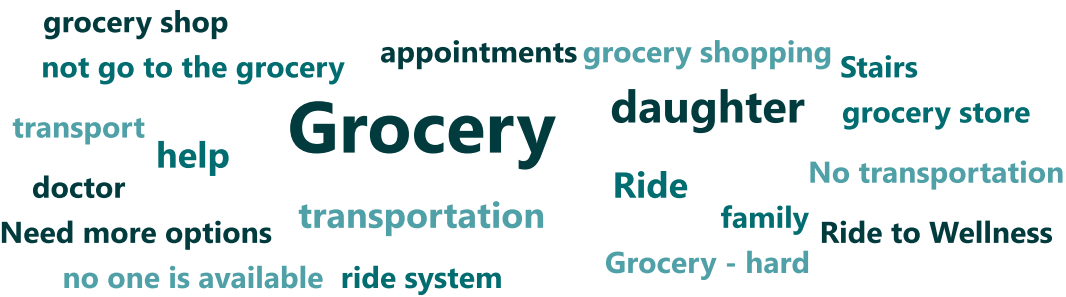
24. If you answered no to the question above, why?

55

Responses

Latest Responses

8 respondents (15%) answered **Grocery** for this question.



25. Are you able to get to the places you want to go (community activities, socialize with friends and family, salon or barber visits)?

Yes	679
No	78
Other	33



26. If you answered no to the question above, why?

81

Responses

Latest Responses

8 respondents (10%) answered **Transportation** for this question.



27. What would make finding transportation easier in your area?

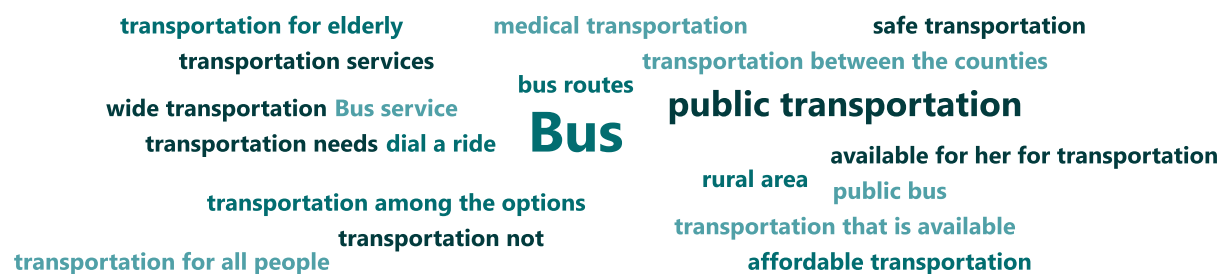
336

Responses

Latest Responses

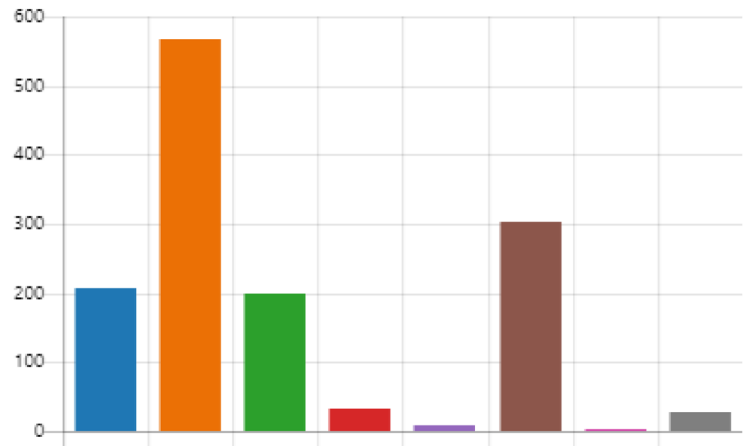
"Advertise on TV and radio"

50 respondents (15%) answered **Bus** for this question.



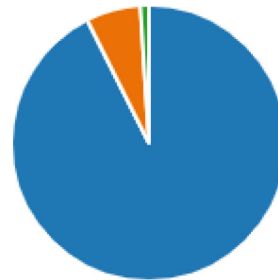
28. What type(s) of health insurance do you have?

Medicaid	207
Medicare	568
Supplemental plan	198
Veteran's healthcare	34
Healthy Michigan	9
Private Insurance (BCBS, Priori...	304
I do not have health insurance	3
Other	26



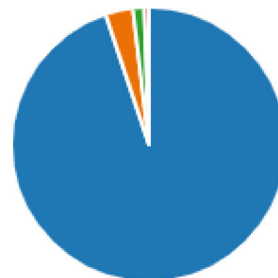
29. Do you have a primary care provider?

Yes	737
No	51
Unsure	8



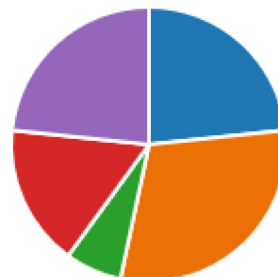
30. If yes, do you see your provider at least once per year?

Yes	707
No	24
Unsure	10
Not applicable	4



31. If you do not have a primary care provider, where do you go to seek medical treatment?

Free clinic	7
After hours clinic	9
Physician who visits you at ho...	2
Emergency Department	5
Other	7



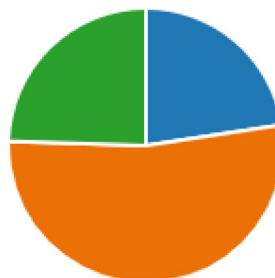
32. Are you aware of any free or low-cost options for health and wellness education in your area?

Yes	283
No	343
Unsure	135



33. Would you be interested in participating in health and wellness education opportunities?

Yes	179
No	419
Unsure	194



34. If you are interested in health and wellness education opportunities, what topics would you be interested in?

161

Responses

Latest Responses

36 respondents (22%) answered **exercise** for this question.

Word cloud showing topics of interest for health and wellness education opportunities. The word **exercise** is the most prominent. Other topics include: impact exercise, memory exercises, exercise options, healthy foods, mental health, Heart health, Diabetes, care, health, exercise classes, Nutrition, health and wellness, chair exercises, Balance, Weight loss, exercises/issues, exercise plan, and arthritis exercise.

35. Have you fallen in the last 12 months?

Yes	261
No	523



36. How often do you feel isolated from others?

Hardly ever, or never	450
Some of the time	258
Often, or always	69



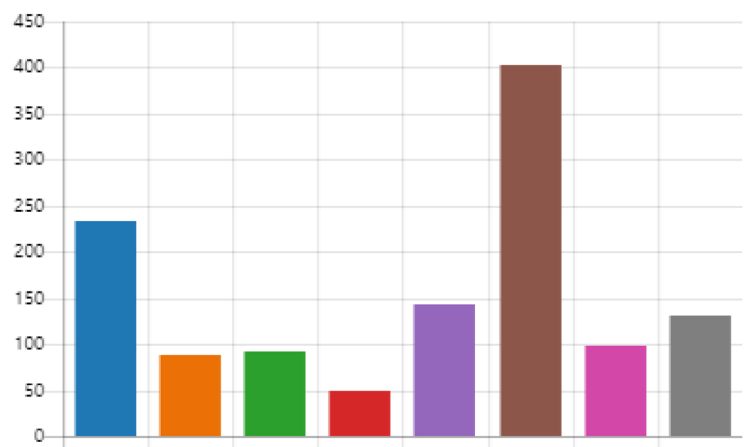
37. How often do you feel lonely?

Hardly ever, or never	432
Some of the time	266
Often, or always	74



38. In what way has the pandemic affected you?

Change in mood	233
Lack of emotional support	87
Change in financial status	92
Not enough in-home care	50
Loss of loved one(s)	143
Lack of socialization opportun...	402
Worsened health status	99
Other	130



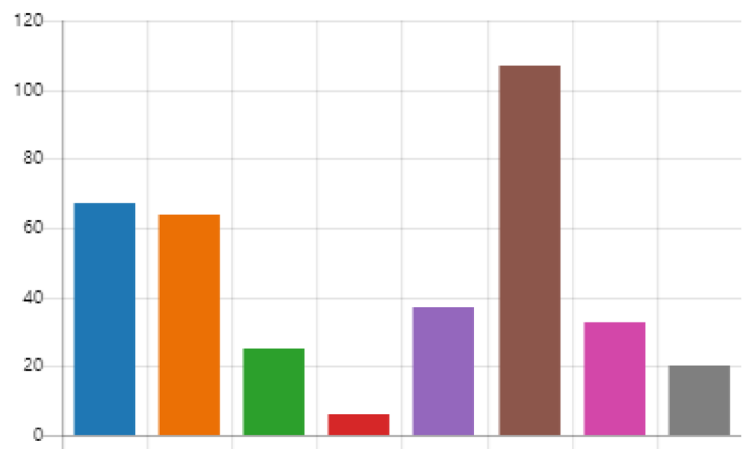
39. Have you helped a friend, neighbor or family member complete their daily care, get to doctor's appointments, go shopping, pay bills, or help around the house in the last 12 months?

Yes	279
No	497
Other	3



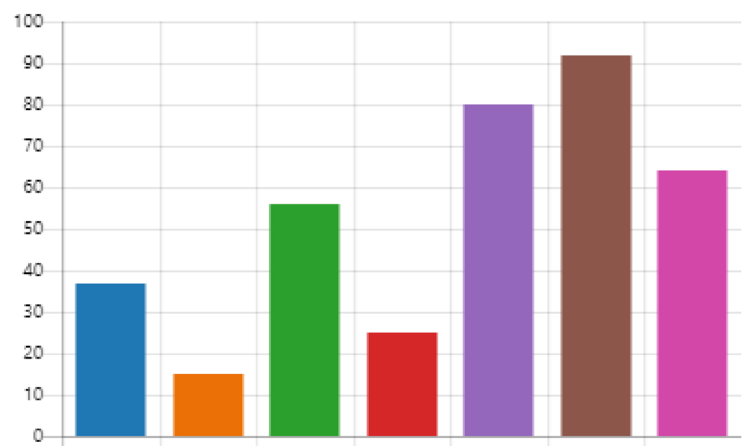
40. What is the relationship of the person you provided care for in the past 12 months?

Spouse/partner	67
Parent	64
Mother/father-in-law	25
Grandparent	6
Son/daughter	37
Friend/neighbor	107
Grandchild(ren)	33
Other	20



41. What is the age(s) of the person/people you provided care for?

Under 18	37
18-24	15
25-59	56
60-64 years	25
65-74 years	80
75-84 years	92
85 or older	64



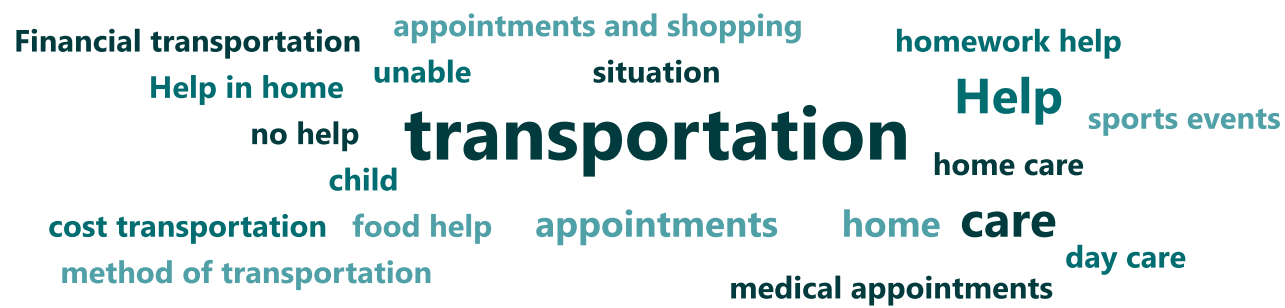
42. If you are over the age of 60 and provide care for an individual(s) under the age of 18, what type of support would be helpful to you?

57

Responses

Latest Responses

6 respondents (11%) answered **transportation** for this question.



43. Does the person/people you care for reside in the same home as you?

Yes	87
No	169



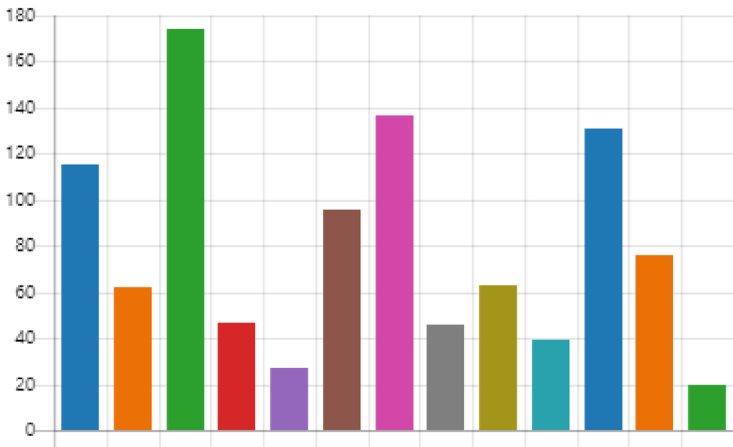
44. How long have you been a caregiver?

Less than 6 months	37
6 months to 1 year	29
1-2 years	24
2-5 years	41
More than 5 years	87



45. What kind of assistance do you provide? (Please check all that apply.)

Cooking, laundry or house cle...	115
Home maintenance repair	62
Transportation	174
Feeding, bathing, toileting, dr...	47
Assistance with transferring to...	27
Meal preparation	96
Shopping	137
Administering medications	46
Managing the person's financi...	63
Direct financial support	39
Providing companionship or s...	131
Arranging and monitoring out...	76
Other	20



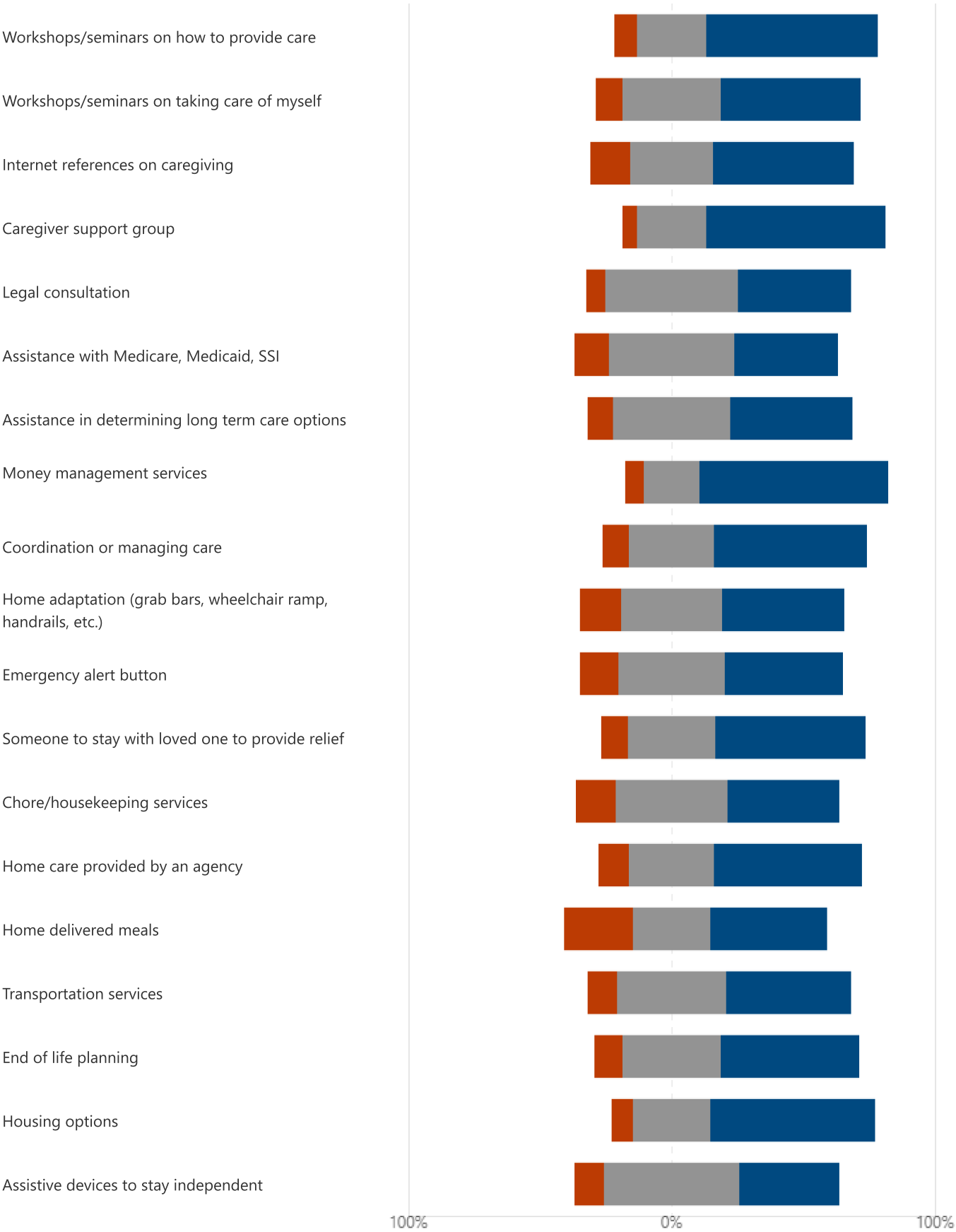
46. Has caregiving caused you:

Physical/health changes	31
Financial strain	29
Emotional strain or stress	98
Not Applicable	117
Other	9



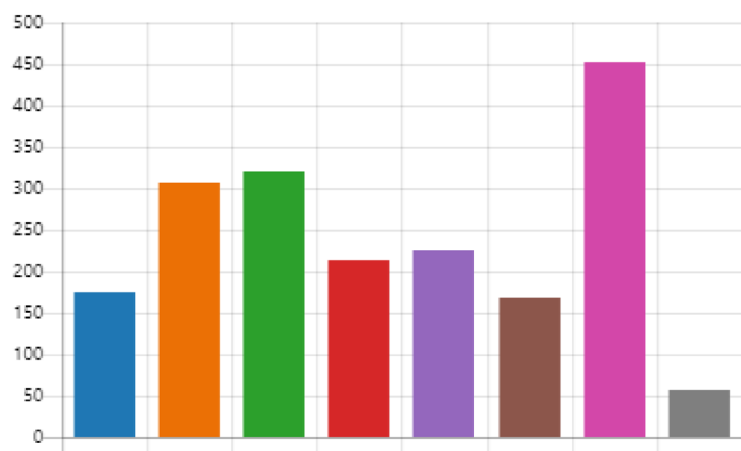
47. Which of the following resources/services do you currently use or would you find useful?

Currently Use Would Use Would Not Use



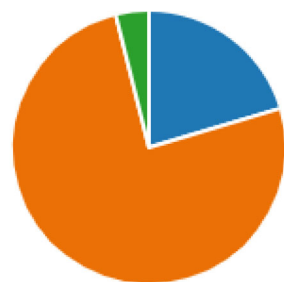
48. Where do you go to find information about resources, program and services (check all that apply)?

Newspaper	174
Local referral agencies (DHHS,...	307
Websites	321
Social media (Facebook, Insta...	213
Television	224
Newsletters and mailings	169
Friends, family, neighbors	452
Other	57



49. Do you ever struggle to pay for prescriptions, medical equipment, co-pays, or medical treatment?

Yes	157
No	583
Unsure	30



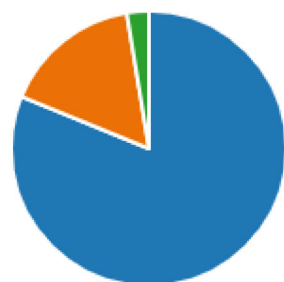
50. Do you have reliable internet access?

Yes	526
No	203
Other	32



51. In the last 12 months, how concerned have you been about getting the food you need?

Not at all concerned about ge...	629
Somewhat concerned about g...	126
Very concerned about getting ...	20



52. If you answered that you have been somewhat or very concerned about getting food in the last 12 months, please explain the reason(s) why.

111
Responses

Latest Responses

"May not have enough on the Bridge card so I go to food banks during..."

31 respondents (28%) answered **food** for this question.



53. Do you have access to food options that reflect your cultural or ethnic customs and preferences?

Yes	568
No	102
Other	38



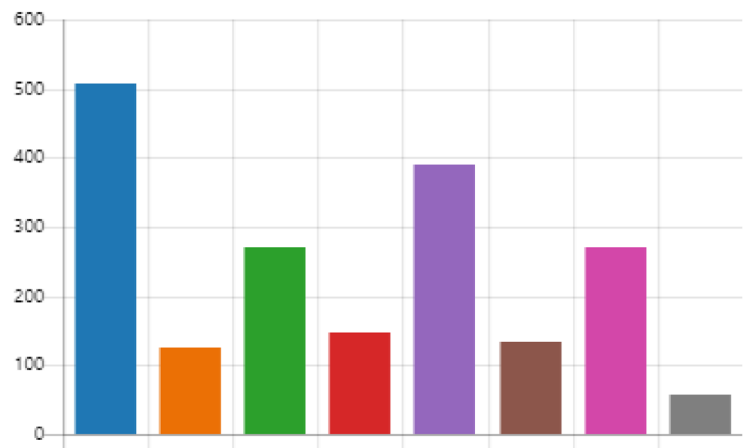
54. Do you have access to food options that meet your dietary needs?

Yes	680
No	46
Other	19



55. What do you believe are the biggest hardships faced by seniors and adults with disabilities in your community?

Loneliness and isolation	506
Abuse, neglect and exploitation	126
Lack of safe, affordable, and a...	271
Insufficient access to healthy f...	147
Lack of transportation options	390
Inadequate medical care	134
Lack of affordable in-home ca...	270
Other	56



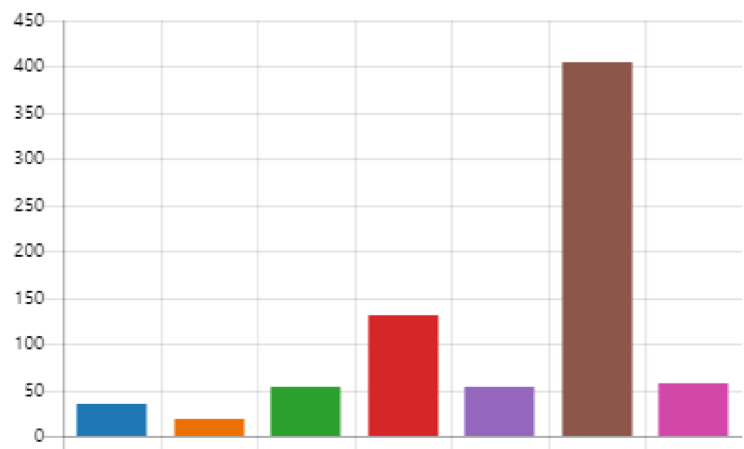
56. Have you completed any end-of-life planning, i.e., will, funeral arrangements, burial plots, advanced directive, documented end of life choices, etc.

Yes	432
No	298
Other	21



57. What needs do you have that are not being met?

I cannot pay my bills	34
I do not know how to access ...	18
I cannot afford care in my home	53
I do not know what services ar...	130
There are basic needs items I ...	54
Not Applicable	405
Other	57



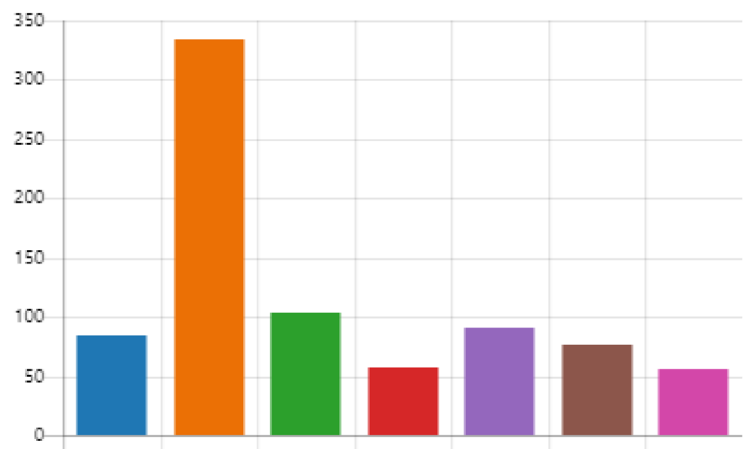
58. Have you had contact with Region 2 Area Agency on Aging in the past and/or are you familiar with Region 2 Area Agency on Aging programs and services?

Yes	425
No	289



59. How have you communicated with Region 2 Area Agency on Aging (check all that apply)?

Website	84
Phone	334
In-person at main office	104
In-person at public event	57
Email	90
Virtual meeting (Zoom, MS Te...)	77
Other	55



60. How would you describe your level of satisfaction with Region 2 Area Agency on Aging services?

Positive	383
Neutral	69
Negative	9



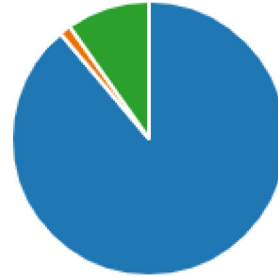
61. Region 2 Area Agency on Aging staff are knowledgeable and courteous.

Yes	413
No	5
Unsure	40



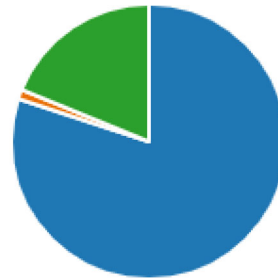
62. The care, services, or information I have received from Region 2 Area Agency on Aging was helpful.

Yes	399
No	6
Unsure	44



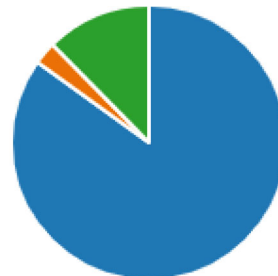
63. Region 2 Area Agency on Aging helps community members live independently.

Yes	357
No	5
Unsure	84



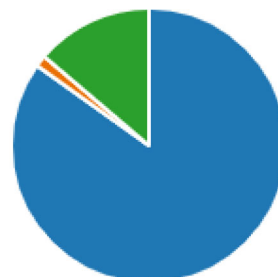
64. The care, services or information I received from Region 2 Area Agency on Aging was timely.

Yes	378
No	12
Unsure	55



65. Region 2 Area Agency on Aging is committed to providing equitable access to services, supports and resources for all.

Agree	382
Disagree	6
Unsure	62



6. If you answered no to the question above, why?

17

Responses

Latest Responses

5 respondents (29%) answered **need** for this question.

A word cloud of responses to question 6. The most prominent words are 'need', 'care', 'people', 'medical needs', 'Agency', 'help', 'laundry help', 'lot of people', 'work closer', 'phone', 'no water', 'better care', 'exercise people', 'Choice CLS', 'information', 'law', 'dementia diagnosis', 'POORLY supported', 'Care providers', 'Home Care', and 'work closer'.

67. Please provide any additional comments related to the needs of older adults, adults with disabilities and caregivers:

185

Responses

Latest Responses

"DHS should be more proactive in providing information about social s...

59 respondents (32%) answered **needs** for this question.

A word cloud of responses to question 67. The most prominent words are 'needs', 'helps', 'senior service', 'Senior Center', 'caregiver', 'home care', 'special needs', 'home repair', 'senior', 'Older adults', 'transportation', 'good to have people', 'Need food', 'service', 'times', 'help with care', 'senior', 'care and her needs', 'senior service', 'need for more options', 'services for seniors', and 'caregiver'.

HILLSDALE COUNTY SENIOR SERVICES CENTER – DATA PROCESSING HIGHLIGHTS

STAKEHOLDER DATA	COMMUNITY-INFORMED DATA
Services seem limited to Baby Boomers Expand marketing and outreach Consider expanding on preventative health Participate in resolving the county's lack of transportation options Partnerships to help all community members; generational and cultural Be intentional of what we do well; we received many compliments that we shouldn't take for granted Affordable housing	Two million residents over the age of 60 in Michigan Hillsdale County has the highest % of 65+ at 20.7% Anticipated rate of increases in the 60+ population in the next ten years – how are we going to serve? Paying for health insurance Transportation challenges Affordable housing – do we have a plan in place Isolation and loneliness identified as the biggest hardship for seniors, especially those with disabilities What unmet, or under resourced services might the Center provide (data-informed)? Increases in aging populations may negatively affect healthcare services in the county Shortage of direct care workers Leading cause of death for seniors is heart disease When ranking healthcare services and supports, 32.2% report as insufficient

HILLSDALE COUNTY SENIOR SERVICES CENTER – CURRENT STATE/FUTURE STATE CHARTING RESULTS

Current State	Future State
Financial Perspective	
Internal controls, policies & procedures are in place Curent budget deficit (small) New audit vendor Unsure if budget adequately reflects funding for current and future services Funds on hold Budgeting is challenged by external organizations/funders Underutilizing Meta Grant Search Bills are paid on time Payroll is met Have funds to protect assets and keep current	Higher staff wages/salaries Diversify funding sources Increase private funding/endowments Higher reserves Abundant and diverse collection of high-performing fundraising opportunities – on a grand scale Consistent COLA increases Improving budgetary training and resources for board and staff leadership Increase opportunities for community members and health care professionals to visit and experience the Center
Customer/Stakeholder Perspective	
Clients delighted with quality of services and staff hospitality Limited marketing of services Missed opportunity for expanded partnerships Commitment to Center’s purpose Current wait list Generous donors Underdeveloped donor development program Robust outreach, but could be better Networking/collaboration with clients and stakeholders Deficit of transportation volunteers Fundraising opportunities Marketing to deficits; lack other marketing language and can limit outreach Limited collaborative relationships with other service providers	Establish values to go along with mission and vision Serve more community members Eliminate wait list Hire more Direct Care workers Create better donor programs and relationships Enhanced marketing and outreach Increase client base (# of clients) Increase in services and new services offered Maintain what is going well Improved perception of Perennial Park across multiple generations Equitable service distribution around the county Additional transportation services Increased collaborative relationships with service providers Plain language messaging/common language messaging Additional at-home social engagement Housing

HILLSDALE COUNTY SENIOR SERVICES CENTER – CURRENT STATE/FUTURE STATE CHARTING RESULTS

Current State	Future State
Internal Assets Perspective	
Physical plan is Good! Gym equipment replacement schedule Consistently upgrade vehicles Computers do not have a replacement schedule Own land that is suitable for development Policies in place (i.e. Employee Handbook) Underdeveloped policies and handbook Working toward a state-of-the-art kitchen Underutilized technology Critical equipment may not meet accessibility needs	More company-owned/leased vehicles Established replacement schedules for technology, vehicles, physical plant Affordable housing Ergonomic environment Improved technology Reduced paper dependence Carport/garage Pool Increase size of Fitness Center All policies, including employee handbook are reviewed annually and are up-to-date Demonstrate nonprofit best practices Fully accessible fleet of transportation vans Driven by data – actually meet needs and make services sustainable
People/Learning Perspective	
Current State	Future State
Home/work life balance – ample flexibility Employees excel in the services the Center provides Professional development through SkillPath conferences Almost all employees feel that their work is mission-oriented Positive, good team culture Communication could be improved Board cohesion could be improved Quality of staff is currently good – retention is key Need to attract more, high-qualified staff Education resources are under-utilized Time set aside specifically for training Regularly scheduled department/leadership meetings Offer life-long learning/life enrichment	Maintain what is working (good work environment) Higher retention rate Create our own pipeline (build the bench) Better communication and internal collaboration Increased learning opportunities and resources Establish annual training budget Increases in staff and volunteers All staff and board understand and play their role in fund development/fundraising Fund development and fundraising processes and procedures Improved hiring processes Updated employee handbook and policies More multi-generational activities Leadership participation in conferences Increased fundraising

Appendix B

1. PowerPoint – Planning Session II
2. Draft Strategic Plan – Consolidated
3. Mind Map – Pool Discussion/Exercise



1



2



3

Your strategic plan defines...

- Where are we now?
 - *Current state*
- Where are we going?
 - *Desired Future State and Objectives*
- How will we get there?
 - *Goals and Strategies*
- How will we know?
 - *Measures of Success - Outcomes*
- How will we measure and report success?
 - *Managing the plan*

4

Data Sources

-  Community Needs Data
-  Stakeholder Interviews
-  Board survey and Staff Survey
-  First Planning Session

5

Hillsdale County has the highest population of 60+ at 20.7%

Rate of increase in 60+ in next 10 years (2M); how are we going to serve them?

Top concerns of seniors include health insurance, transportation, affordable housing, shortages of Direct Care Workers

Leading cause of death is heart disease

Isolation and loneliness were cited as a top concern in the Triple A survey

Healthcare services and supports; 32.2% rated these as insufficient (Triple A)

Hardships for seniors with disabilities.

What about mental health services? Bereavement services? Might the mental and physical health Fitness Center be better promoted?

How might the Center build upon its existing services to meet the concerns/needs cited by seniors in the various community surveys?

Highlights from Community Data

6

Highlights from Stakeholder Data

7

-  Baby Boomers; programs for Baby Boomers, direct messaging/outreach to Boomers
-  Marketing/Outreach
-  Preventative Health
-  Transportation
-  Affordable Housing
-  Partnerships to help all community members – generational and cultural
-  Be intentional of what we do well; many compliments we shouldn't be complacent

Staff survey summary

8

- Culture is the foundation and embodiment of an organization. When Hilldale County Senior Services Center employees were prompted, "Our mission and values are important to me," **100% of respondents answered either "strongly agree" (70%) or "agree" (30%).** Members of the Center team are not just completing tasks – they are working toward an important goal, outlined by the mission. And this solid foundation is evident across the board.
- Staff in large part, appear to work together well as teams and across teams, trust each other and feel good about their work; they have a sense of purpose. They feel they are respected and provided opportunities for growth.
- Indeed, a positive and collaborative work environment, where team members are comfortable and satisfied with their job and leadership, translates into **better service for consumers.** This is borne out in the stakeholder interviews where responses were overwhelmingly positive about the Center.

HCSSC STRATEGIC PLANNING SESSION

8

Vision for the future – common themes from both board and staff

- | | |
|-------------------------|---|
| Financial | <ul style="list-style-type: none">• Increase in stable/unrestricted funding• Fund development plans for big-ticket items |
| Customers/ Stakeholders | <ul style="list-style-type: none">• More clients accessing programs and services• Ability to meet customer demand/no wait-lists for services |
| Internal Assets | <ul style="list-style-type: none">• Finalize plan and develop senior housing• Improved internal communication processes |
| People and Learning | <ul style="list-style-type: none">• Reduced employee turnover rates• Increased board cohesion and performance |

10/6/2023

HCSSC STRATEGIC PLANNING SESSION

9

9



Balanced scorecard model

10

Strategic Plan Model

3-5 Year Strategic Direction							
Financial Perspective Objective		Customer/ Stakeholders Perspective Objective		Internal Assets Perspective Objective		People & Learning Perspective Objective	
Goals		Goals		Goals		Goals	
Strategies	Measures of Success	Strategies	Measures of Success	Strategies	Measures of Success	Strategies	Measures of Success

11



“Review and Refine” Process

Explore each section of the Draft Strategic Plan as presented

Review each section using the Thought Stimulators for guidance

Refine for clarity and intent

Rinse and repeat

12

Strategic Direction

A description of the desired future state of the Center. Defines what the Center will look like once it's achieved its objectives and goals.

In 2029, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

13

Strategic Objectives and Goals

Strategic Objective	Goals
<i>Objectives that are specific to the organizational perspective, while also contributing to the desired future state.</i>	<i>Goals that are broad and continuous. Designed to move the Center closer to its strategic objective, and therefore, its desired future state.</i>

14

Thought Stimulators

Does each objective contribute to the strategic direction?

Does each goal support its strategic objective?

Will the objectives and goals move the Center in the direction of its desired future state?

Are each of these goals clear and achievable?

Do the goals stimulate thinking about specific strategies?

15

Financial Perspective

Strategic Objective:
Financial stability and sustainability with sound fiscal management practices.

Goals:

1. Budgets are reflective of future growth.
2. Existing sources of funding are stabilized.
3. Unrestricted funding is increased.

16

Strategic Objective:

The Center is adaptive to the emerging needs of the people and communities it serves.

Goals:

1. *Internal capacity is adaptive to serve current and future client needs.*
2. *The community's knowledge and understanding of the Center's programs and services is increased.*
3. *External collaborative partnerships and relationships are expanded.*

Customer/Stakeholders Perspective

17

BREAK – 10 MINUTES



18

Internal Assets Perspective

Strategic Objective:

Facilities and resources necessary to achieve the Center's mission and serve the community into perpetuity.

Goals:

1. *The Center's physical plant and assets accommodate current and future client needs.*
2. *Workplace environment, equipment and tools are conducive and adaptive to staff needs.*



19

People and Learning Perspective

Strategic Objective:

Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.

Goals:

1. *The board operates at a level necessary to meet the evolving needs of the Center.*
2. *A healthy, positive, and desirable workplace environment is actively advanced.*



20

Measures of Success

Answers "what do we expect to see if we achieve our goals?"

Identify indicators of performance

Encourage and allow for adjustment



21

Thought Stimulators

- What do we expect to be different?
- What specifically do we expect to accomplish?
- What are some benchmarks, or incremental changes we might expect to see?
- How might we measure performance or progress?

22



Refining Measures of Success

1. One perspective per table
2. Select a recorder/reporter
3. Review the draft measures for your starting perspective
4. Affirm or revise those listed
5. Discuss and record any new measures on the appropriate flip chart

23

BREAK – 10
MINUTES



24



Monitoring & Evaluating the Plan

How will you monitor/evaluate the plan?

- Scorecards
- Dashboards
- **Reports - To whom and how often?**
 - What information might the board need to effectively support the implementation of the plan?
 - What and how will you share with the stakeholders?

25

Information Processing

 Have a conversation at your tables about what operational information the board receives—right now.

 Reflect on overall plan.

 Select a recorder/reporter

 Discuss what information the board needs to know to effectively support the implementation of the plan.

 Be prepared to report out.

26

Next Steps

Board's role

- Affirm and adopt the plan
- Determine frequency/method of monitoring and evaluating
- Use the plan to guide decision-making

Staff's role

- Develop and prioritize strategies for each goal
- Craft action plans for each strategy
- Determine reporting processes—internal and external
- Report progress to board (and stakeholders)

EVERYONE

- ☐ Commit to the plan for one, full year.
- ☐ Adapt and adjust as necessary

27

TIMELINE

AUGUST
21ST

Meet with staff
Design and prioritize
strategies

AUGUST
29TH

Present plan to board
Finalize monitoring &
evaluation processes

DEC.
2023

Consultant check in



28

BONUS CONTENT



Evaluate the status of the Housing
Plan and define next steps/roles &
responsibilities



Explore the idea of the Pool and
what it will take to get there

29

Information Processing – First Step

Generate a description of the existing
state

Describe the desired state; What is the
goal? What will you see when the
desired state is achieved?

Identify the resources required to
achieve the desired state. Consider skills,
knowledge/information and behavior.

30



List all major responsibilities/tasks on the left side of a chart.



List the names of the committees, team members and other people related to the responsibilities at the top of the chart



Review all responsibilities and code as follows:

"R" to mean directly responsible for the task
 "A" to indicate who must authorize decisions (for the task)
 "S" to indicate members providing support
 "I" for those who must stay informed
 Optional: Add a column for timeline for each task to be completed

Information Processing— Step Two; Responsibility Charting

31

BREAK – 10 MINUTES



32



To Pool or Not to Pool...that is the question

33



Wrap up

Reflect individually, then share with the group:

- A reason for optimism that you will achieve your goals

Thank You!



HCSSC Strategic Plan - Consolidated

Strategic Direction: In 2028, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

Strategic Objective	Overarching Goals	Measures of Success	Possible Strategies
Perspective: Financial			
<i>Financial stability and sustainability with sound fiscal management practices.</i>	1. <i>Budgets are reflective of future growth.</i>	Annual increases in operational reserves. Consistent cost-of-living increases. The Center's assets and facilities are well-maintained and/or replaced as scheduled. Technology and staff resources are state-of-the-art.	Improve budgeting training/development strategies for board and staff.
	2. <i>Existing sources of funding are stabilized.</i>	Budgeting challenges are managed. Relationships with funders are maximized. Opportunities to develop new funding sources.	Evaluate and rank existing funding sources by level of stability
	3. <i>Unrestricted funding is increased.</i>	Additional unrestricted funding sources are cultivated and maintained. Annual increases in operational reserves.	Refine the donor development program. Conduct fund development training for board and staff. Develop comprehensive fund development plan
Perspective: Customers/Stakeholders			
<i>The Center is adaptive to the emerging needs of the people and communities it serves.</i>	1. <i>Internal capacity is adaptive to serve current and future client needs.</i>	Increase in unduplicated clients served across the Center and specific services/programs by 5% annually. Wait lists are reduced by 5% quarterly or eliminated. Services are data driven. Equitable, data driven service distribution throughout the county.	Explore additional in-home social engagement opportunities. Develop decision-making processes to ensure service expansion is data informed. Include feedback and impact measures in service design and delivery.
	2. <i>The community's knowledge and understanding of the Center's programs and services is increased.</i>	Messaging is consistent throughout all outreach channels. Perceptions of the Center are improved across multiple generations.	Conduct regular open house events targeting specific groups. Further develop volunteer recruitment/management processes. Adapt and adjust existing marketing strategies to expand reach, (e.g. use of digital marketing)
	3. <i>External collaborative partnerships and relationships are expanded.</i>	Increased collaborative relationships with all stakeholder groups. Perceptions of the Center are improved across multiple generations.	

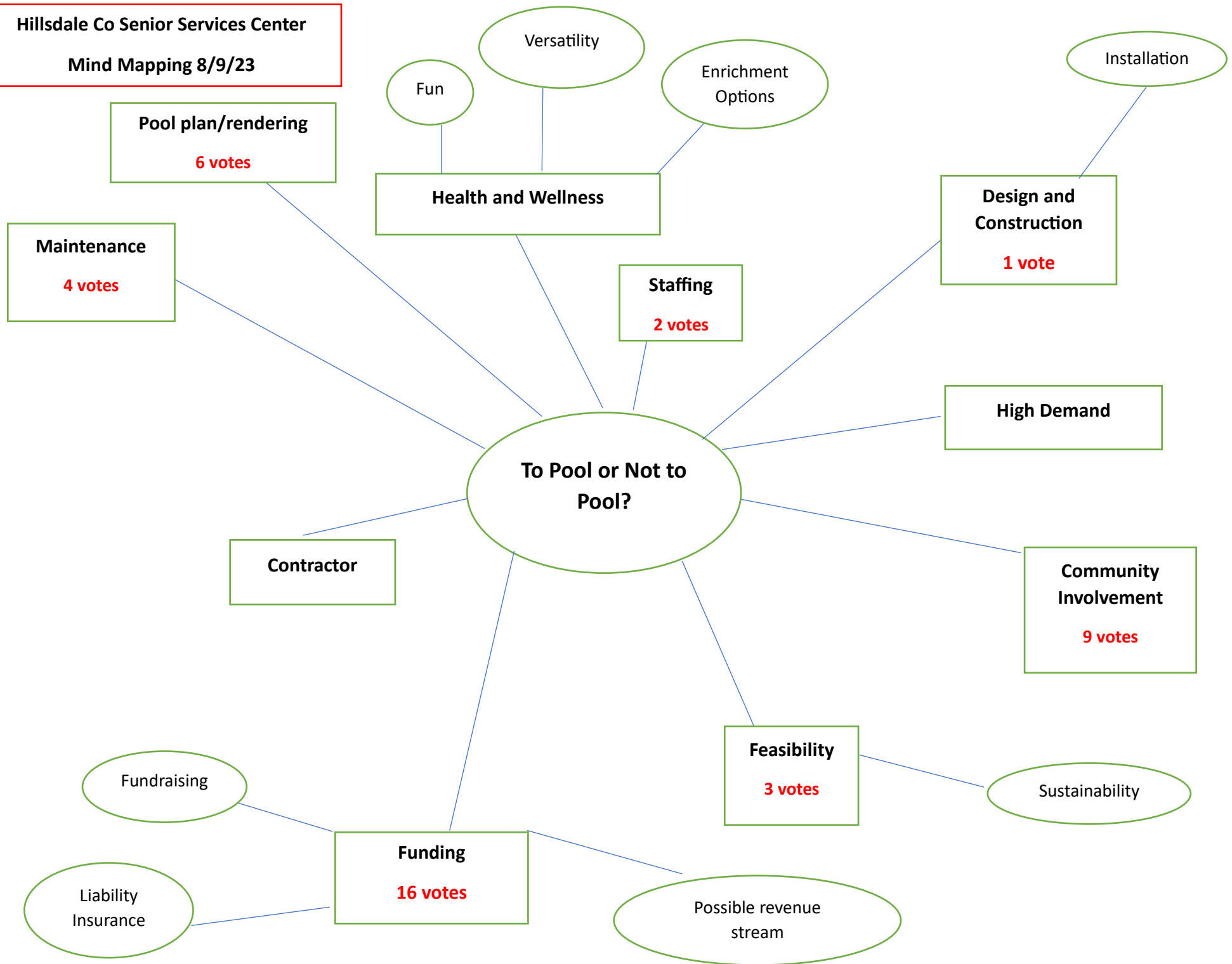
HCSSC Strategic Plan - Consolidated

Strategic Direction: In 2028, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

Strategic Objective	Overarching Goals	Measures of Success	Possible Strategies
Perspective: Internal Assets			
<i>Facilities and resources necessary to achieve the Center's mission and serve the community into perpetuity.</i>	1. <i>The Center's physical plant and assets accommodate current and future client needs.</i>	Accessible equipment and transportation needs are met. Technology is up-to-date and conducive to staff and client needs. Preventative maintenance and replacement schedules are budgeted for and followed. Kitchen facilities are state-of-the-art. Overall waste is greatly reduced.	Refine preventative maintenance and replacement schedules for all physical assets. Develop a waste-reduction program in collaboration with local experts. Conduct a county-wide transportation survey. Develop a comprehensive housing plan with timelines and funding strategies. Develop/refine process to analyze and prioritize large capital projects.
	2. <i>Workplace environment, equipment and tools are conducive and adaptive to staff needs.</i>	Ergonomic workspaces are the norm. All employee policies and handbooks are up to date. Decision-making is data informed.	Identify the desired elements for a conducive and adaptive workplace environment. Develop short- and long-term benchmarks toward improving the tangible elements of a conducive and adaptive workplace. Update and distribute employee policies and handbook.
Perspective: People and Learning			
<i>Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.</i>	1. <i>The board operates at a level necessary to meet the evolving needs of the Center.</i>	Board is actively engaged in fund development and fundraising. Nonprofit best practices are deployed at the administrative and board levels. Budget reflects commitment to professional development for staff and board. Board demonstrates its commitment to its development.	Board refines its recruitment, onboarding and development policies and processes. Board budgets for and establishes professional development plans for all members. Board conducts annual self-assessments to track progress.
	2. <i>A healthy, positive, and desirable workplace environment is actively advanced.</i>	Nonprofit best practices are deployed at the administrative and board levels. Overall internal communication is improved. The Center is an "employer-of-choice". Budget reflects commitment to professional development for staff and board. Staff retention rates are improved.	Define elements of a healthy workplace specific to the Center. Develop short- and long-term benchmarks toward improving the intangible elements of a healthy workplace. Develop and document the Center's values (in addition to Mission and Vision.)

Hillsdale Co Senior Services Center

Mind Mapping 8/9/23



Appendix C

1. PowerPoint Presentation – Planning Session III
2. Results of Strategy Development Session
3. Strategy Action Plan template



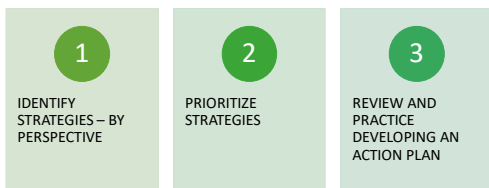
1



Today's
purpose
TO ENGAGE THE STAFF
IN DEVELOPING AND
PRIORITIZING
STRATEGIES

2

Agenda



3

Checking In

- Introduce yourself
- Briefly name your mood or anything that might distract you from full participation
- When finished, say "And, I'm in."



4

Strategic Plan Model



5

Strategic Objectives and Goals

Strategic Objective	Goals
<i>Descriptive objectives that are specific to the organizational perspective, while also contributing to the desired future state.</i>	<i>Broad and continuous goals that are achievable-with-a-stretch. Designed to move the Center closer to its strategic objective, and therefore, its desired future state.</i>

6

Measures of Success

Answers "what happens if we achieve our goals?"

Identify indicators of performance

Encourage and allow for adjustment



7



Strategies

Describes how you expect to achieve the goal(s).

Board and staff each have the opportunity to contribute to the goals.

8

Deciding who Decides

Strategic Direction, Objectives and Goals
= Board with Staff input

Administrative Strategies =
Executive Leadership

Operational
Strategies = ED with
Department input

9



Customers/Stakeholders:

Internal capacity is adaptive to serve current and future client needs.

The community's knowledge and understanding of the Center's programs and services is increased.

External collaborative partnerships and relationships are expanded.

Internal Assets:

The Center's physical plant and assets accommodate current and future client needs.

Workplace environment, equipment and tools are conducive and adaptive to staff needs.

People and Learning:

A healthy, positive and desirable workplace environment is actively advanced.

10



11



Putting Ideas on the Table

But don't climb up there with it

Intent is to share our thinking in a way that supports others in engaging with our contributions

To be effective, ideas must be released to the group

Equally important, is to know when to pull ideas off the table

12

Identifying Strategies

-  Refer to the Draft Consolidated Plan document
-  Review the selected goals and measures, beginning with the People & Learning perspective
-  Individually, brainstorm possible strategies that will contribute to achieving the goal – *record on sticky notes*
-  You are exploring "How" you will achieve the goal –
-  What needs to be done?
-  What are some possible paths forward?

13

Share your Ideas

Begin with three ideas – one idea per sticky note
 When you're ready, bring them to the flip chart and read them aloud
 Place your sticky notes where your idea is similar to another, or place it in a "new" area
 Once all ideas have been grouped, Patrice and Julie summarize the essence of the shared idea
 Move on to the next goal



14

Break – 10 minutes



15



Prioritizing Strategies

16

Organizing the Strategies

As a group, we will discuss which strategies fit in which category – Now, Next, Future

Using the Criteria Matrix as our guide, we'll evaluate each strategy against the criteria to help us prioritize

This prioritization strategy is primarily about capacity and resources – are they existing, or might they need to be developed?



17

Break – 10 minutes



18

Strategies

• How will we achieve the goal(s)?

Actions/Activities

• Specific steps or tasks to be performed.

Resources

• What do we need? Staff, time, money, etc.

Measures (Drives the data to be collected)

• What are the indicators of performance?
• What are the means to determine progress toward the goal?

Person Responsible

• Who will lead the completion of the action step?

Timeline

• When do we begin? When do we "check-in"? When will we be finished?

19

Next Steps

Board's role

- Affirm and adopt the plan
- Determine frequency/method of monitoring and evaluating
- Use the plan to guide decision-making

Staff's role

- Develop and prioritize strategies for each goal
- Craft action plans for each strategy
- Determine reporting processes – internal and external
- Report progress to board (and stakeholders)

EVERYONE

- Commit to the plan for one, full year
- Adapt and adjust as necessary

20

Reflect individually,
then share with the
group:

*Your best
moment of
the day*

Thank You!

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Wrap up

7

Customers/Stakeholders Objective: *The Center is adaptive to the emerging needs of the people and communities it serves.*

Goal #1: *Internal capacity is adaptive to serve current and future client needs.*

Strategy #1: Develop methodology and metrics to measure impact and outcomes of existing programs and services.

Suggested Actions/Activities from staff leadership:

- Track referrals from staff, other agencies, clients
- Get feedback from clients to see how to improve services and use positive feedback for marketing
- Be specific when surveying clients and potential clients; are there hindrances to them using our services?
- Research methods used by other successful nonprofits
- Adopt best practices

Strategy #2: Develop processes to guide data-informed decision-making about new programs, program growth, scale, or modification.

Suggested Actions/Activities from staff leadership:

- Conduct surveys to find out client needs and wants
- Develop multigenerational Think Tank
- Multigenerational approach to identifying and addressing current and future needs and to recruit new donors
- Assess data from annual reporting and see what services need to be expanded, etc.
- Make decisions based on data

Goal #2: The community's knowledge and understanding of the center's programs and services is increased.

Strategy #1: Explore and implement innovative marketing and outreach strategies utilizing technology and social media

Suggested Actions/Activities from staff leadership:

- Innovative and new marketing strategies (QR code)
- Multi-generational approach
- Website; TV; Radio (WCSR live)
- Be adaptive to messaging trends and continually expand and innovate marketing strategies
- Utilize Tik Tok, Instagram etc.
- TV in lobby with info
- Use certain hash tags on social media posts to reach certain demographics
- Become the community's first through regarding senior services via relationships with community leaders
- Ask clients if we can tag them on social media post

Strategy #2: Expand and improve in-person, local and regional outreach opportunities.

Suggested Actions/Activities from staff leadership:

- Have staff put out flyers in shared spaces; make sure all departments are advertised and explained to the public
- Develop ads (movie theatre) and billboards and commercial

- Speak at service clubs, churches; share the mission and services
- Continue engagement with Townships/city meetings; prioritize other civic organizational meetings for director/coordinator talks
- Better communication with public about how center's money is earned and how millage dollars are utilized
- Invite organizations to tour building and send informational packets to potential organizations we would like to work with
- Have a family fun night
- Regular open houses and events/ site tours
- Explore additional in-home social engagement opportunities

Strategy #3: Create a culture of ambassadorship by board, staff and volunteers

Suggested Actions/Activities from staff leadership:

- Encourage staff/employees and Board to share on social media
- Enhance volunteer recruitment
- Educate volunteers
- Be proud of what we do; feel comfortable speaking to friends, family and even strangers about what we do
- Educate staff on all services; they can then spot other needs of clients while conducting their jobs
- Promote volunteers helping online
- Volunteer hours exchanged for events

Goal #3: External collaborative partnerships and relationships are expanded.

Strategy #1: Explore and build relationships with high performing/ best practice organizations

Suggested Actions/Activities from staff leadership:

- Partner with college about professional begging; how to get donors
- Guest speaker from Hillsdale College donor relations dept
- Engage more medical pros for tours and services

Strategy #2: Seek out and cultivate multi-generational partnership opportunities

Suggested Actions/Activities from staff leadership:

- Community Action Agency/Head Start; bring to congregate meals
- Continue to grow multigenerational programs
- Host an event for all generations
- Work with high school for volunteers

Strategy #3: Target collaborations with organizations providing similar/like services

Suggested Actions/Activities from staff leadership:

- Partner more closely with Hillsdale Hospital and their specialty care clinics
- Veterans Administration
- Rebuild relationship with REH (?) regarding medical transportation

- Develop new lines of partnership with other, similar organizations
- Connect with nonprofits that serve meals; possible collaboration to reduce foods costs
- Research organizations that work with similar demographics; get staff suggestion
- Dial-A-Ride; extra transportation for special events

Strategy #4: Maximize services provided by nonprofit and industry specific associations

Suggested Actions/Activities from staff leadership:

- Better utilize current nonprofit memberships
- Leadership participation in county council on aging workgroups
- Collaborate with state agencies to identify trends in care and/or anticipated requirements

Strategy #5: Create/participate in local and regional networking opportunities

Suggested Actions/Activities from staff leadership:

- Speaking engagements to improve communication between agencies
- Network to access new and diverse sources of knowledge and skills, resources
- Create a local nonprofit network, website or discussion board where ideas, wants and needs are shared that will create a collaborative relationship (i.e., Chamber)
- Go to summits and meetings that include a variety of businesses and agencies around the county/state to network with new organizations

Strategy #6: Identify and resolve current gaps in important relationships/collaborations

Suggested Actions/Activities from staff leadership:

- Conduct a gap analysis
 - Identify gaps in relationships/agencies and across generations
 - Identify gaps in structure of collaborative partnerships
 - Develop action plans to support the building/re-building of professional, mutually beneficial relationships
-

Internal Assets Objective: *Facilities and resources necessary to achieve the Center's mission and serve the community in perpetuity.*

Goal #1: *The Center's physical plant and assets accommodate current and future client needs.*

Strategy #1: Explore and implement innovative approaches to fund existing and new physical plant and assets

Suggested Actions/Activities from staff leadership:

- Look into leasing programs for fitness equipment and for mow vehicles
- Explore additional grant opportunities
- Identify fitness equipment manufacturers and collaborate lease or purchase agreements
- Create a position dedicated to center advancement/proper utilization of assets; create processes; collect data

Strategy #2: Develop a long-range preventative maintenance and replacement plan for Center assets

Suggested Actions/Activities from staff leadership:

- Refine preventative maintenance and replacement schedule for all assets
- More efficient/update Oliver machine for mow
- Steamer for more efficient workflow in kitchen
- Make sure equipment and vans are well-maintained with monthly inspection checks and make sure necessary update or fixes are made
- Continue to use volunteers for maintenance of building and cars while working with other nonprofits
- Increase company vehicles
- Create a new parking lot and delivery drop off plan
- Create better heating/cooling zones
- Look into options for better heating/cooling system for office kitchen; too loud

Strategy #3: Create opportunities for multi-generational, client-informed asset planning

Suggested Actions/Activities from staff leadership:

- Have clients fill out a survey for what equipment/technology the center should add to make it more enjoyable and/or accessible
- Develop a funding strategy for fundraising
- Establish client-based facilities needs (i.e., walking track, swimming pool, etc.)
- Client/community needs survey; review annual survey with data specific questions

Strategy #4: Develop and implement Housing Plan

Suggested Actions/Activities from staff leadership:

- Develop a housing plan for future development with timeline and funding strategies
- Clarify the role and risks to the Center and board of directors
- Identify the housing developer
- Obtain a 425 Annexation agreement between the City of Hillsdale and Hillsdale Township

Goal #2: Workplace environment, equipment and tools are conducive and adaptive to staff needs

Strategy #1: Design and implement an ergonomic workplace environment

Suggested Actions/Activities from staff leadership:

- Conduct an ergonomic workspace assessment/audit
- Desks that can be moved up and down
- Implement ergonomic workspaces
- Research what other offices have been doing to become more ergonomic (and create funding stream to support)

Strategy #2: Develop and implement a balanced, workplace wellness culture

Suggested Actions/Activities from staff leadership:

- Develop short- and long-term benchmarks towards improving intangible elements of the workplace
- Policies that mandate breaks, take walks, etc.
- Establish staff-based fitness equipment wish list as well as programs
- Have a balance between work and home life
- Workplace environment that supports physical and mental health; healthy workplace food choices, breaks, fairness, and flexibility (Mental health resources)

Strategy #3: Ensure appropriate technology, software and related equipment is available to all staff

Suggested Actions/Activities from staff leadership:

- Standardize time management systems (MEPRS)
- Develop an office furniture replacement schedule
- Ergonomic desks, keyboards, monitors
- Key fobs/cards to capture time vs entering on phone or computer
- Upgrade computers and training
- Move from desktop to laptops or tablets
- Issue work cell phones
- Continue to be part of pilot program regarding tech
- Engage current software tracking vendor to create unified software solution
- Have staff fill out a survey for what technology they may need for their department to run more efficiently; develop a funding stream or put out a wish list for folks to donate items or money
- Ask staff to report upgrade of tech/equipment needs on a quarterly basis; prioritize from most needed to least. Develop a plan to address most needed.

Strategy #4: Update staff handbook, policies, and procedures

Suggested Actions/Activities from staff leadership:

- Update employee handbook so more relevant to issues we are now facing
- Have staff go over employee handbook individually and then come together to see what updates need to be made; ask for clarifications; offer any additions and amendments
- Take to Board for approval on a schedule

Strategy #5: Ensure workspaces allow for efficient and effective workflow and performance

Suggested Actions/Activities from staff leadership:

- Develop a schedule for software updates
 - Better office arrangements and positions that are conducive to job description and needs (i.e., Randy not in Mech room; Rob and Dan connected
 - Made sure the office and public areas are clean and always organized; or have scheduled check in days
-

People and Learning Objective: *Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.*

Goal #2: *A healthy, positive, and desirable workplace environment is actively advanced.*

Strategy #1: Develop a robust staff recruitment, retention, and succession plan/program

Suggested Actions/Activities from staff leadership:

- Board offers a revised benefits package that meets current market demands (for nonprofits)
- Develop and maintain a turnover ratio that fits the center's needs
- Find ways to retain the good employees
- Pipeline established for prospective employees; internships, paid and unpaid
- Explore other recruiting avenues – schools
- Recruit more staff
- Develop and maintain a strong bench of employees and Board members
- Create cross-functional teams and team members

Strategy #2: Develop an employee-informed recognition, training, and development plan

Suggested Actions/Activities from staff leadership:

- Develop a new staff recognition program
- Get input from staff – what training, education, exposure do they want (even if not work related)
- Introduce all employees to different internal meetings for input and understanding
- Proactive awareness: more mental health awareness tools, plans in place
- Internal minimum standard for professional development

Strategy #3: Develop, document, and acknowledge the demonstration of shared values of the Center

Suggested Actions/Activities from staff leadership:

- Encourage all staff to participate in Tank Talk Tuesdays (?) via email to say what or who they are thankful for at the Center
- Give our recognitions for staff members that highlight how they exemplify our values – share online and in the newsletter
- Develop and document the Center's values

STRATEGY ACTION PLAN

PERSPECTIVE:
STRATEGIC OBJECTIVE:
GOAL:
STRATEGY:

ACTIVITY <i>What are the specific actions/steps we need to take?</i>	RESOURCES <i>The tools needed: staff, time, money, etc.</i>	MEASURES/OUTCOMES <i>Indicators of performance /measure of progress</i>	PERSON(S) RESPONSIBLE <i>Who is in charge of making this happen?</i>	TIMELINE <i>When do we begin/when will we finish? When do we check in?</i>

Hillsdale County Senior Services Center – Strategy Prioritization

The following Criteria Matrix is an example of how you might prioritize your strategies. The criteria are based on the types of capacity and resources that are available to you, or those that may need to cultivate. As you consider each strategy, determine the extent to which each strategy passes each criterion. Rate as High (3), Medium (2) or Low (1). Record your results on the criteria matrix and analyze the scores to see which alternative has the highest total points.

CRITERION	Strategy #1	Strategy #2	Strategy #3	Strategy #4
Availability of resources				
Active partners/collaborators				
Organizational readiness and capacity				
Few known obstacles				
Builds on existing knowledge and assets				
TOTALS:				

Once you've scored your strategies, discuss, and select the one or two for which you will create an Action Plan.

Capacity for implementing specific strategies is important to consider. Your strategic plan is intended to guide decision-making over the next three-to-five years. Your opportunities for success greatly increase if you select those strategies for which you are best prepared. An illustration through the lens of a time horizon follows:

Short-Term 12-18 months

- Builds on existing programs/activities
- Active partners/collaborators
- Few obstacles
- Uses existing organizational capacity

Intermediate 2-4 years

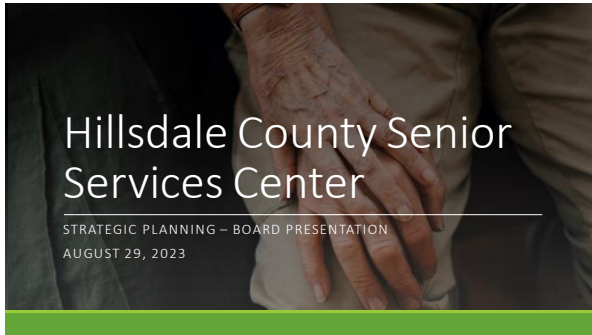
- Sufficient data to guide decision-making
- Potential partners interested and willing to collaborate
- Obstacles mostly known and manageable
- Will stretch organizational capacity

Long-term 5-10 years

- No existing or past action/activity
- Need to build community consensus
- Multiple obstacles
- Will require additional organizational capacity

Appendix D

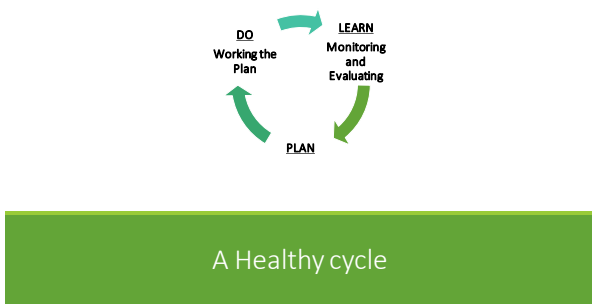
1. PowerPoint Presentation – Board Presentation
2. Administrative Goals Summary
3. Final Strategic Plan – Consolidated
4. Revenue Evaluation Matrix template



1

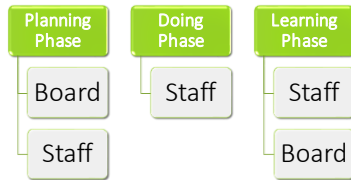


2



3

Strategic Planning Roles



4



Balanced scorecard model

5

Strategic Plan Model



6

Session I – Giving Meaning to Data

Pre-work included:

- Board survey
- Staff survey
- Stakeholder Interviews

Analysis and summary of community data:

- MDHHS Aging & Adult Services Agency State Plan FY2021-2023
- 2022 BHSJ Health Department Annual Report
- 2022 Community Action Agency Community Needs Assessment
- 2022 Hillsdale Community Health Center Assessment
- Region II Area Agency on Aging 2022 Community Needs Assessment



Current State – Future State

7

Session II – Review and Refine



3-5 Year Strategic
Direction



Objectives and Goals –
All Four Perspectives



Measures of Success

8

Session III – Strategy Development

1

IDENTIFY
STRATEGIES – BY
PERSPECTIVE

2

PRIORITIZE
STRATEGIES

3

REVIEW AND
PRACTICE
DEVELOPING AN
ACTION PLAN

9

Strategic Direction

A description of the desired future state of the Center. Defines what the Center will look like once it's achieved its objectives and goals.

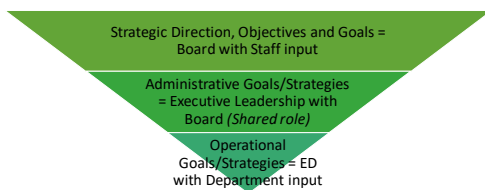
In 2028, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

10

Strategic Objective	Overarching Goals	Measures of Success
Financial/Executive Perspective		
1. Budgets are reflection of future growth.		Annual increases in operational reserves. Consistent cost-of-living increases. The Center's assets and facilities are well-maintained and/or replaced as scheduled. <i>and</i> staff resources are up state-of-the-art.
2. Financial stability and sustainability with sound fiscal management practices.		Technology. Budgeting challenges are managed. Relationships with funders are maintained. Opportunities to develop new funding sources.
3. Existing sources of funding are stabilized.		
4. Diversified funding is increased.		Additional unrestricted funding sources are cultivated and maintained. Annual increases in operational reserves.
Customer/Stakeholder Perspective		
1. Customer capacity is adaptive to serve current and future client needs.		Increase in unpaid staff clients served across the Center and specific services/programs by 75% annually. Staff time are reduced by 75% priority or eliminated. Services are data driven - 75% priority or eliminated. CAPACITY: Staff direct service distribution throughout the county.
2. The community's knowledge and understanding of the Center's programs and services is increased.		Marketing is consistent throughout all outreach channels. Perceptions of the Center are improved across multiple generations.
3. External collaborative partnerships and relationships are expanded.		Increased collaborative relationships with all stakeholder groups. Perceptions of the Center are improved across multiple generations.
Internal Assets/Operative Perspective		
1. The Center's physical plant and assets accommodate current and future client needs.		Accessible equipment and transportation needs are met. Technology is up-to-date and conducive to staff and client needs. Preventative maintenance and replacement schedules are budgeted for and followed.
2. Workplace environment, equipment and funds are conducive and adaptive to staff needs.		Office facilities are state-of-the-art. Overall assets is greatly reduced. Equipment maintenance is up to date. All employee policies and handbooks are up to date. Decision-making is data driven.
People and Learning Perspective		
1. The board consists of a broad cross-section of the community to meet the evolving needs of the Center.		Board is actively engaged in fund development and fundraising. Long-term fund practices are reviewed at the administrative and board levels. Budget reflects commitment to professional development for staff and board. Board demonstrates its commitment to its development.
2. A healthy, positive, and desirable workplace environment is actively sustained.		Nonprofit best practices are followed at the administrative and board levels. The Center is an "employer of choice". Overall internal communication is improved. Budget reflects commitment to professional development for staff and board. Staff retention rates are improved.

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Board and Staff Roles



12

Administrative and Operational Goals

Administrative	Operational
Financial:	Customers/Stakeholders:
Budgets are reflective of future growth.	Internal capacity is adaptive to serve current and future client needs.
Existing sources of funding are stabilized.	The community's knowledge and understanding of the Center's programs and services is increased.
Unrestricted funding is increased.	External collaborative partnerships and relationships are expanded.
People and Learning:	Internal Assets:
The board operates at a level necessary to meet the evolving needs of the Center.	The Center's physical plant and assets accommodate current and future client needs.
	Workplace environment, equipment and tools are conducive and adaptive to staff needs.
	People and Learning:
	A healthy, positive and desirable workplace environment is actively advanced.

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Strategic Objective	Overarching Goals	Measures of Success	Possible Strategies
Perspective: Financial			
Financial stability and sustainability with sound fiscal management practices.	Budgets are reflective of future growth.	Annual increases in operational reserves. Consistent cost-of-living increases. The Center's assets and facilities are well-maintained and/or replaced as scheduled. Technology and staff resources are state-of-the-art.	Improve budgeting training/development strategies for board and staff.
	Existing sources of funding are stabilized.	Budgeting challenges are managed. Relationships with funders are maximized. Opportunities to develop new funding sources.	Evaluate and rank existing funding sources by level of stability.
	Unrestricted funding is increased.	Additional unrestricted funding sources are cultivated and maintained. Annual increases in operational reserves.	Refine the donor development program. Conduct fund development training for board and staff. Develop comprehensive fund development plan.
Perspective: People and Learning			
Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.	The board operates at a level necessary to meet the evolving needs of the Center.	Board is actively engaged in fund development and fundraising. Nonprofit best practices are deployed at the administrative and board levels. Budget reflects commitment to professional development for staff and board. Board demonstrates its commitment to its development.	Board refines its recruitment, onboarding and development policies and processes. Board budgets for and establishes professional development plans for all members. Board conducts annual self-assessments to track progress.

14

Monitoring & Evaluation

Four primary purposes:

- To integrate the plan into the work of the Center
- To facilitate discussion and ensure adequate resources
- To adapt and adjust, as necessary
- To report progress to your customers and stakeholders



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Monitoring & Evaluating the Plan - Recommended



Department Level

Strategies deployed
Data collected and reported to Coordinator/ Supervisor; Progress toward goals and measures of success



Administrative Level

Strategies deployed
Departmental data reviewed and processed
Data summarized and reported to Board by ED; Progress toward goals and measures of success



Board Level

Strategies deployed
Board checks its progress toward goals/measures of success
Board reviews and monitors overall progress
Focus on access to resources necessary to work the plan/deploy the strategies

16

NCSSC Strategic Plan

Strategic Direction: In 2028, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

Strategic Objective	Overarching Goal	Key Strategy	Measures of Success	Progress Toward Goal
Priority Area of Focus: Financial Sustainability				No progress due to: (discuss obstacles/challenges)
Priority Area of Focus: Customers/Stakeholders				Progress stalled due to: (discuss obstacles/challenges)
Priority Area of Focus: Internal Assets				Action plan on target. (List key accomplishments)
Priority Area of Focus: People and Learning				

17

Content of Final Plan

Executive Summary	Plan Components	Tools and Templates
Synopsis of process and outcomes	Detailed description and explanation of each of the Plan's components	- All related data - Sample templates - Instructions

18

Next Steps

Board's role

- Affirm and adopt the plan (board action)
- Determine frequency of monitoring and evaluating (monthly, quarterly, etc.)
- Use the plan to guide decision-making (*How might this decision contribute to the achievement of our goals? Or, not?*)

Staff's role

- Prioritize strategies for each goal
- Craft action plans/activities for each strategy
- Determine reporting processes – internal and external
- Report progress to board (and stakeholders)

EVERYONE

- ☐ Commit to the plan for one, full year
- ☐ Adapt and adjust as necessary

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Thank you

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Strategic Objective	Overarching Goals	Measures of Success	Possible Strategies
Perspective: Financial			
Financial stability and sustainability with sound fiscal management practices.	Budgets are reflective of future growth.	Annual increases in operational reserves. Consistent cost-of-living increases. The Center's assets and facilities are well maintained and/or replaced as scheduled. Technology and staff resources are state-of-the-art.	Improve budgeting training/development strategies for board and staff.
	Existing sources of funding are stabilized.	Budgeting challenges are managed. Relationships with funders are maximized. Opportunities to develop new funding sources.	Evaluate and rank existing funding sources by level of stability
	Unrestricted funding is increased.	Additional unrestricted funding sources are cultivated and maintained. Annual increases in operational reserves.	Refine the donor development program. Conduct fund development training for board and staff. Develop comprehensive fund development plan
Perspective: People and Learning			
<i>Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.</i>	<i>The board operates at a level necessary to meet the evolving needs of the Center.</i>	Board is actively engaged in fund development and fundraising. Nonprofit best practices are deployed at the administrative and board levels. Budget reflects commitment to professional development for staff and board. Board demonstrates its commitment to its development.	Board refines its recruitment, onboarding and development policies and processes. Board budgets for and establishes professional development plans for all members. Board conducts annual self-assessments to track progress.

HCSSC Strategic Plan - Consolidated

Strategic Direction: In 2029, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

Strategic Objective	Overarching Goals	Measures of Success
Financial Perspective		
Financial stability and sustainability with sound fiscal management practices.	1. Budgets are reflective of future growth.	Annual increases in operational reserves. Consistent cost-of-living increases. The Center's assets and facilities are well-maintained and/or replaced as scheduled. Technology and staff resources are state-of-the-art.
	2. Existing sources of funding are stabilized.	Budgeting challenges are managed. Relationships with funders are maximized. Opportunities to develop new funding sources.
	3. Unrestricted funding is increased.	Additional unrestricted funding sources are cultivated and maintained. Annual increases in operational reserves.
Customer/Stakeholder Perspective		
The Center is adaptive to the emerging needs of the people and communities it serves.	1. Internal capacity is adaptive to serve current and future client needs.	Increase in unduplicated clients served across the Center and specific services/programs by 5% annually. Wait lists are reduced by 5% quarterly or eliminated. Services are data driven. Equitable, data driven service distribution throughout the county.
	2. The community's knowledge and understanding of the Center's programs and services is increased.	Messaging is consistent throughout all outreach channels. Perceptions of the Center are improved across multiple generations.
	3. External collaborative partnerships and relationships are expanded.	Increased collaborative relationships with all stakeholder groups. Perceptions of the Center are improved across multiple generations.

HCSSC Strategic Plan - Consolidated

Strategic Direction: In 2029, the Hillsdale County Senior Services Center is a well-funded, financially stable organization that anticipates and exceeds the needs of Hillsdale County's senior community.

Strategic Objective	Overarching Goals	Measures of Success
Internal Assets Perspective		
Facilities and resources necessary to achieve the Center's mission and serve the community into perpetuity.	1. The Center's physical plant and assets accommodate current and future client needs.	Accessible equipment and transportation needs are met. Technology is up-to-date and conducive to staff and client needs. Preventative maintenance and replacement schedules are budgeted for and followed. Kitchen facilities are state-of-the-art. Overall waste is greatly reduced. Decision-making is data informed. Funding strategies and timeline targets are met. Housing is developed.
	2. Workplace environment, equipment and tools are conducive and adaptive to staff needs.	Ergonomic workspaces are the norm. All employee policies and handbooks are up to date. Decision-making is data informed. Short- and long-term benchmarks toward improving intangible elements of the workplace are developed, tracked and achieved. Technology upgrades and improvements are reflected in the budget.
People and Learning Perspective		
Fully engaged, high-performing board, staff and volunteers, appropriately scaled with robust supports to ensure their success.	1. The board operates at a level necessary to meet the evolving needs of the Center.	Board is actively engaged in fund development and fundraising. Nonprofit best practices are deployed at the administrative and board levels. Budget reflects commitment to professional development for staff and board. Board demonstrates its commitment to its development.
	2. A healthy, positive, and desirable workplace environment is actively advanced.	Nonprofit best practices are deployed at the administrative and board levels. Overall internal communication is improved. The Center is an "employer-of-choice". Budget reflects commitment to professional development for staff and board. Staff retention rates have been improved. Center values statement is developed, communicated, and widely promoted.

Revenue Evaluation Matrix

The Revenue Evaluation Matrix is a tool for evaluating an organization's financial situation and revenue mix. It can be used to evaluate the stability of your current revenue streams, gauge the potential of new revenue sources, and compare your organization's funding mix to that of similar organizations.

The Matrix was developed by Fieldstone Alliance and is based on the initial work of Jon Pratt, Executive Director of the Minnesota Council of Nonprofits. Pratt developed a process to help organizations evaluate their financial situation based on the "reliability and autonomy" of current funding sources. He reported on his work in the Winter, 2005 issue of *Nonprofit Quarterly*, a publication devoted to best practices in the nonprofit sector.

Fieldstone Alliance consultants expanded on Pratt's concept by adding potential *new* revenue sources (not just the organization's current ones) and additional evaluative criteria to the analysis.

How to Use the Tool

Typically, a team consisting of the organization's board and staff leaders, perhaps assisted by a consultant, tailors the tool to their situation by working on three basic tasks:

1. Determining the universe of current and potential revenue sources to be evaluated
2. Determining the criteria to be used in evaluating each of the revenue sources
3. Rating each of the revenue sources against each of the criteria

For most nonprofits, we recommend using a single universe relating to the whole organization. For others, especially those with a complex business structure, we recommend that a separate tool be developed for each major activity or enterprise. Organizations can also use the tool to evaluate a proposed new business line.

In setting up the matrix, it's important to have a broad menu of revenue options; few should be eliminated at this point. The menu typically includes the organization's current revenue streams, new ones it has already identified for possible development, revenue sources of comparable organizations, and other possibilities identified through research. (The sample matrix on page 3 shows 18 revenue sources divided into five general categories: contributed, earned, membership, public, and miscellaneous.)

Once the revenue universe is identified, each of the sources is then evaluated by a set of criteria determined by the organization such as:

- How strong is the revenue source? How likely is it to produce major revenues for you in the years ahead?
- How likely is it that the revenue source could help leverage other revenue sources?
- How consistent is the revenue source with your mission? Should a source be excluded because, no matter how strong or reliable it is, it conflicts with your basic mission and values?

- Will pursuit of this revenue source become such a major distraction for your leadership that other program areas may suffer?
- When the public becomes aware of the revenue sources (assume that they will), what effects will this have on your ability to raise revenues from other sources?
- Will the revenue source generate conflicts between you and your major funders? Might these conflicts discourage your current funders from continuing to fund you?
- Will the work required to generate the revenues be too large when compared to the net revenues likely to flow from the source? (This is particularly relevant for earned income sources.)
- Will use of this particular revenue source lead to enhanced regulatory burdens?

If some criteria are more important than others, the team should weight the options. You may choose to double-weight some factors. (See the sample matrix. The formulas for the first four factors have been double-weighted.)

Each revenue source is then scored for each of the evaluative criteria as either +2, +1, 0, -1, or -2. The sum of these criteria (scores as adjusted for any weighting) is then averaged into a composite score for each revenue source. The revenue sources are then ranked according to their composite averages. (On the sample matrix the four types of contributed revenue are scored and ranked.)

The top-ranking sources are then analyzed in more detail. We want to emphasize that although we believe this scoring system is helpful, it should never be considered an absolute measure of the value of revenue sources. There needs to be some sort of “reality check” before any final commitments are made to pursue—or drop—any source. After applying the reality check, the selected revenue sources are not always the top-ranked ones (e.g. the final listing may be those ranked 1, 2, 5, 6, and 8).

Finally, the selected revenue sources are used to build your new revenue model. Because it will take time to fully engage new revenue sources, you may also want to develop a multi-year transition to the new revenue model.

Sample Revenue Matrix

Scale: 2=very positive; 1=positive; 0=neutral or "don't know"; -1=negative; -2=very negative

Revenue Source	Criteria*							Avg	Rank
	1	2	3	4	5	6	7		
Contributed									
Corporate contributions and sponsorships	0	1	0	-1	0	-2	1	-0.1	4
Foundation grants for specific programs	2	0	1	1	2	0	0	1.4	1
Foundation grants for general operations	2	2	-2	-2	2	0	0	0.3	2
Individual donations	1	2	-1	-1	1	-1	-2	0.0	3
Earned									
Consultant services fees								0.0	
Book sales								0.0	
Training/webinar fees								0.0	
Sale or licensing of intellectual property								0.0	
Membership									
Core member dues								0.0	
Affiliate member dues								0.0	
Sustaining member contributions								0.0	
Public									
Federal or state earmarks								0.0	
Government grants/contracts								0.0	
Dedicated tax source revenues								0.0	
Miscellaneous									
Debt (including PRIs)								0.0	
Leases/subleases								0.0	
Quasi-equity (tax credits, EQ2s, etc)								0.0	
Investments/interest								0.0	

***Criteria (correspond to columns #1-7)**

1. Alignment with mission and values
2. Discretion over how the money is spent (i.e. it is not restricted)
3. Reliable—predictable and consistent
4. Potential for future growth
5. Politically acceptable to stakeholders
6. Effort needed to generate revenues is not excessive
7. Use of this source will not impair other needed revenue sources