



# **STRATEGIC PLAN 2005-2010**

**Senior Citizen Services of Metropolitan Atlanta, Inc.**

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**2004-2005 Strategic Planning Group**

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## **Background**

### **About Senior Citizen Services and the Strategic Planning Process**

**Senior Citizen Services (SCS)** is celebrating its fortieth year of service to Atlanta seniors in 2005. With its rich history of direct service to seniors, SCS was the first not-for-profit organization to provide services to seniors in Atlanta, focusing its efforts on home and community-based services that allow seniors to remain in their own homes and communities.

During the past fifteen years significant changes have taken place within the aging services community, from the number of nonprofit organizations serving seniors to the flow of tax dollars in grants that support seniors in need. With an imminent upsurge in the senior population older adults, leaders at SCS realized that it would be challenged to continue to provide services in the future if a strategic plan was not enacted to guide the agency through increasingly challenging times.

**Organization Change Alliance (OCA)** is an alliance of organization change practitioners that, along with its provision of opportunities for professionals, selects several pro-bono projects each year that are seeking assistance in conflict resolution, process consulting, strategic planning, or other change processes. As one of OCA's 2004-2005 pro-bono projects, SCS has benefited from the expertise and guidance of a consulting team that has a well-rounded skill set with regard to helping organizations to change.

The **Strategic Planning Group** was selected to represent various stakeholders that are important to the success of the organization. The Strategic Planning Group consisted of three standing board officers, two former board members, three staff members, a major donor, a client and an SCS Foundation officer.

## **Environmental Scan**

One of the first steps of the Strategic Planning process was to perform an environmental scan. Group members sought feedback from various stakeholder groups, funding entities, or sister organizations via face-to-face or phone interviews, written surveys, and focus groups. The following stakeholder groups, funding entities, or sister organizations were asked for feedback:

A Meal To Remember donors  
A Meal To Remember past honorees/chairs  
Altria Grants Program  
Atlanta Regional Commission  
Board Members  
Buckhead AARP  
Caregivers of Adult Day Care  
City of Atlanta Grants Management  
Clients of Golden Techies program  
Clients of HOMES  
Clients of Meals On Wheels Atlanta  
Clients of Neighborhood Senior Centers  
Fannie Mae Foundation  
Fulton County Office of Aging  
Lifespan  
Major Donors  
Past Board Members  
SCS Foundation Members  
Senior Connections  
Staff members from each program/work area  
United Way of Metropolitan Atlanta  
Visiting Nurse Health System

## **Mission and Vision**

### **MISSION STATEMENT**

**The mission of Senior Citizen Services is to enable seniors to enjoy a high quality of life, maintaining their independence and dignity.**

### **2010 VISION**

In 2010, with baby boomers retiring, services to seniors will take on new dimensions. Senior Citizen Services will anticipate these changes, and pioneer innovative programs to meet and exceed the needs of the community.

## **Core Values**

### **Mission-/Client-Driven**

Our organization will continue to prioritize the ever-changing needs of seniors, holding fast to its tradition of compassion and direct service. We believe that prolonging independence for seniors will continue to be a need as the senior population expands, and that continuing to help seniors along a broader spectrum of needs will be necessary.

### **Collaborative**

Our organization will be a leader in its external focus to support the needs of seniors. SCS will continue to explore the role of a coordinator, collaborator, organizer, and/or catalyst in the community. Collaboration is particularly important with fellow senior providers and nonprofit organizations, government entities, businesses and the faith-based community.

### **Financially Stable**

Our organization's financial direction and programming will continue to be one that promotes financial stability and perpetuity. Aggressive fund development and sound cost management will continue to be priorities for the organization. As a means of increasing our non-governmental funding, private support will be explored, including individuals, the corporate community, faith-based organizations, and recipients of services and their families/caregivers. SCS will seek to re-establish a funding corpus from which it can rely when operating funds are insufficient.

### **Volunteer Leveraged**

Our organization can better accomplish its mission through the support of compassionate volunteers. Designing program delivery around volunteer involvement will strengthen programs and lessen administrative costs. Where possible, we believe that seniors volunteering for fellow seniors, and neighbors volunteering for fellow neighbors can provide a uniquely powerful support network and model for service delivery.

### **Communicative**

We strive to ensure that communication is consistent and clear to contributors, staff, clients, and community alike—that our message matches our mission at all levels. We desire receptiveness to the voices of all constituents. We will support and nurture an environment of honest and candid dialog.

## **Strategic Goals**

With our mission and values in mind, the following goals will help us to accomplish our vision:

**Goal # 1: To nurture/establish a community of expertise that produces innovative programming to optimize service to/for seniors;**

**Goal # 2: To include broad segments of the senior community in programs and services;**

**Goal # 3: To attract and cultivate a broad spectrum of resources that ensure financially sustainable operations;**

**Goal # 4: To adapt the organization to a volunteer-driven model of service delivery;**

**Goal # 5: To foster an environment where the contributions of staff, volunteers, contributors and clients, caregivers and their families are valued;**

**Goal # 6: To raise the organization's visibility within various communities.**

## **Goal #1: Optimize**

**Goal # 1: To nurture/establish a community of expertise that produces innovative programming to optimize service to/for seniors;**

Objectives:

- 1-1 Research and consider potential merger and/or strategic collaboration possibilities
  - 1-1.1 Timeline: Committee to make recommendations to Board by October and/or December 2005
  
- 1-2 Determine building sales plan(s) and potential overlap with Objective 1-1.
  - 1-2.1 Timeline: Committee to make recommendations to board by October and/or December 2005
  
- 1-3 Learn and apply best practices about non-profit collaborations and aging services innovation opportunities from local, regional and national experts
  - 1-3.1 Timeline: Initially by June 2006...and ongoing throughout the plan
  
- 1-4 Identify and implement strategies that raise the level of expertise of the staff team and the Board of Trustees (eg: committees, experts on board, education opportunities)
  - 1-4.1 Timeline: Gradually implement – measure by January 2007
  
- 1-5 Develop new symbiotic management models (“*inner circles*”) for engaging clients, their peers, educators, corporate partners, funders, staff, and the Board in all services and programs.
  - 1-5.1 Timeline: By June 2008

## **Goal #2: Broaden**

**Goal # 2: To include broad segments of the senior community in programs and services;**

Objectives:

- 2-1 Research and implement private pay/sliding scale model where seniors with means are able to access needed services
  - 2-1.1 Timeline: Initial phases started by March 2006. Fully implemented by March 2007.
  
- 2-2 Understand various needs (and level of satisfaction) across city within different demographic and psychographic groups within aging programs
  - 2-2.1 Timeline: By December 2005.
  
- 2-3 Based upon Objective 2-2, determine and expand on SCS' strengths for communities in need
  - 2-3.1 Timeline: By June 2007

## **Goal #3: Sustain**

**Goal # 3: To attract and cultivate a spectrum of resources that ensure financially sustainable operations;**

Objectives:

- 3-1 Utilizing the work plans developed in Objective 1-3, determine and raise additional capital for start-up, new expenses, “remodeling” of programs, etc.
  - 3-1.1 Timeline: Determine budgets by November 2005; initial fundraising push October 2005-July 2006
  
- 3-2 Diversify funding sources with greater attention on private-sector opportunities
  - 3-2.1 Timeline: Ongoing—desire to have 3-8 additional sustainable funding sources by 2009
  
- 3-3 Establish short- and long-term fundraising plans that utilize donor feedback to drive strategies with emphasis on board leadership in fund development
  - 3-3.1 Timeline: Short-term plan should be ready by start of fundraising push in November 2005; Long-term plan TBD
  
- 3-4 Continue to support high standards within internal Finance practices and oversight, including promoting longevity in staff and board level financial knowledge
  - 3-4.1 Timeline: Board-approved systems in place and working smoothly by October 2005; Quarterly assessments and semi-annual board trainings; long-term financial management plan in place by July 2006.

## **Goal #4: Adapt**

**Goal # 4: To adapt the organization to a volunteer-driven model of service delivery;**

Objectives:

- 4-1 Commission a working task force to structure the re-orienting of SCS staffing plan and programming around volunteer recruitment, retention and coordination
  - 4-1.1 Make initial recommendations in concert with Objective 1-3 by October 2005. Implementation may not fully take place until fundraising complete in 2006.
  
- 4-2 In conjunction with Objective 4-1, engage in senior-to-senior and neighbor-to-neighbor volunteer initiatives, more robust volunteer retention, recognition and recruitment practices, and efforts with regard to corporations/businesses, communities of faith, groups and individuals
  - 4-2.1 Part of volunteer work plan—initial by October 2005; Implementation 2006-2007

## **Goal #5: Foster**

**Goal # 5: To foster an environment where the contributions of staff, volunteers, contributors and clients and their caregivers/families are valued;**

Objectives:

- 5-1 Establish and regularly evaluate standards of conduct, recognition plans, and lines of communication. Initial approach will be through a small staff-driven committee to make recommendations
  - 5-1.1 Recommendations due by October 2005 with implementation to take place later in 2006-2007
  
- 5-2 Increase the training and development opportunities of staff and volunteers
  - 5-2.1 Recommendations for budget year 2005-2006 by June 2005

## **Goal #6: Raise Visibility**

**Goal # 6: To raise the organization's visibility within the community.**

Possible Objectives:

- 6-1 Develop communications task force and comprehensive communications and marketing plan for five-year period, utilizing volunteer expertise and actual market research where possible; conduct possible re-branding as a result of plan
  - 6-1.1 Timeline: by December 2006
  
- 6-2 Devote appropriate resources to establishing and maintaining community presence
  - 6-2.1 Timeline: to be included in Objectives 1-3 (initial estimates by October 2005) and 3-1 (include in fundraising plan for 2006)

**STRATEGIC PLAN  
2005-2010**



**Next Steps:**

- Board of Trustees Adopt Strategic Plan
- Staff Strategic Plan Presentation
- Designing Implementation Strategy  
& Start Action Planning
- Begin Implementation
- Monitoring and Evaluating

## **Additional Environmental Data:**

The first phase of the Strategic Planning process involved a comprehensive environmental scan. Following are various learning points noted by the Strategic Planning Group:

- According to the 2000 US Census, there was an increase of 8.5% (Atlanta area) in the senior population (age 65 or greater) in the last decade, with the population expected to double by 2035.
- Of the more than 93,000 seniors in the Atlanta metropolitan area, at least 22% are living with mobility and/or self-care limitations.
- Fulton and DeKalb Counties had over 47% of the region's older adults as of the 2000 US Census.
- 25% of the residents of the City of Atlanta are living below poverty, and 16% of Fulton County's population 75 years old or greater are living below poverty.
- 78% of seniors in the Atlanta region own their own homes, and 30% of seniors live in homes built before 1950.
- Atlanta had the fifth highest growth rate in the senior population according to the 2000 US Census.
- The following is a sampling of results from an Atlanta Regional Commission needs survey of older adults:

Concern of Older Adult	% of Respondents Indicating Concern is CRITICAL
Transportation to Medical Appointments	87.2%
Affordable Prescription Drugs	84.8%
Personal Care Services in the home	51.2%
Support for Family Caregivers	42.4%
Home Delivered Meals	40.8%
Accessing Government Services	40.8%
Home Repairs	36.8%
Adult Day Care	32.8%
Wellness Programs	19.2%

- The Buckhead/Sandy Springs areas of Atlanta are projected to have a higher aging population within the next five years than other areas within Atlanta.
- Increase in funding in County programs

Source: The Atlanta Regional Commission: "The Atlanta Region Area Plan on Aging, FY 2004-2007", April 2003.