



Encore Experiences at Harleysville
Strategic Planning 2011 – 2014
Approved: February 16, 2011

The strategic planning subcommittee of Encore Experiences began meeting in July 2010. Participants include: Kim Licata, President; Andy Santana, Vice President; Joann Barnak, Treasurer; Betty Linko, Secretary; Bob Schoen, Member at Large; and Robin Burstein, Executive Director. Mark Lieberman and Larry Fiebert joined us from Montgomery county Family Services ECO program to Facilitate this discussion.

Encore Experiences' mission is to provide access to programs and resources that help older adults live independently and remain active.

The committee reviewed the information at hand:

2008 – 2011 goals and results:

1. *Transform Center Based Services to become Senior Center of Choice for older less mobile adults.*
 - a. Over time we have increased our participation by both, older less mobile and younger more active adults.
 - b. We have seen dramatic increases in participation in all areas.
 - i. 82% growth in the number of general program attendees.
 - ii. 33% increase in number of known people asking for help and a 65% increase in requests from unknown people
 - iii. Almost 100% increase in number of unknown requests each year – two year increase of 341%
 - iv. All fitness programs combined show approximate 23% increase in participants and the number of programs attended
 - v. Fitness room increased number of people by 63% and increased use by 235%
 - vi. 19% increase in the number of volunteers and number of hours
2. *Establish Encore Experiences*
 - a. We realized very shortly after the strategic plan was created that there were many options for older volunteers already existing in our community. Instead of recreating the wheel, we created a partnership with RSVP.
 - i. This partnership has provided us with additional volunteers and several of our members have taken advantage of RSVP opportunities and volunteer for other community projects.
2. *Build a strong organization*
 - a. We have created a committee structure that has served the organization well. In addition to Board members, additional community members have served on our

committees. Specifically our financial planning committee was noted as making a huge difference in organization planning.

- b. We have created a strategic marketing plan and a formalized annual development plan. Both plans have helped to keep the staff, Board and committees focused on attainable steps to reach our goals.
- c. We became nationally accredited by the National Institute of Senior Centers in February 2010. Of the over 6,000 full service senior centers in the U.S., less than 200 can claim this recognized status.

CCAT Recommendations include:

- a. Create clearer criteria and measurement tools to use to determine the effectiveness of your programs
- b. Use evaluation findings to change programs and services
- c. Increase the number of staff/volunteers doing outreach, community organizing and advocacy
- d. Increase readiness of staff members to become leaders
- e. Reduce organizations reliance on one leader enough so that his/her leaving wouldn't slow the organization
- f. Increase the number of staff/volunteers you have with the skills needed to raise funds from the government, corporations and foundations.

Recommendations from the Accreditation Peer Reviewer include :

- a. Begin to consider programs, hours and services that resonate with the baby boom generation
- b. Enhance the job descriptions by including a description of skills, experience, and education that each position requires
- c. For next accreditation process, expand the committee to provide wider visibility and greater inclusiveness

Facilitated discussions included conversations on:

Assumption Based Thinking
Funding Mix
Partnerships
Growth Opportunities
Barriers to Fulfilling our Mission
Outreach to Diverse Populations
Disaster Planning
Board and Staff Development
Becoming Highly Effective Organization

We developed a questionnaire to survey full board and community stakeholders and gather information to help us set goals and prioritize action steps. The questionnaire was distributed via Survey Monkey and completed by 11/13 Board Members, 6 Staff, 28 Participants/Members, 5 Volunteers, 15 Community Members, 4 Funders, 3 Partners and 12 Others.

New Goals for 2011 – 2014

1. Become Financially Stable: *Both the board and general community survey rated this goal as most important. The committee members agree and emphasized the need to be strong financially in order to continue providing services to those that need them.*

Action Items to be completed in order of priority:

- a. Investigate Federal Grants
- b. Create Major Donor Program
- c. Grow Endowment Fund

2. Improve programs, hours and services so that they resonate with the baby boom generation and other diverse populations within our target audience: *There has been much conversation in the Senior Services community regarding target audience for services. This conversation generally polarizes two potential audiences as the frail elderly or the Baby Boom generation. This conversation neglects the community of people in between these groups – generally aged 70 – 85, retired, and still interested in community involvement, staying fit and active, and interested in a variety of community interests and learning opportunities. This is the current audience at Encore Experiences. These people are just older than the Baby Boomers, yet our activities and services are designed to prevent or delay becoming frail elderly. Our target audience must also include the Baby Boom generation as they age into the system and begin looking for the types of services we can provide.*

Action Items to be completed in order of priority:

- a. Enhance case management and family consultations.
- b. Focus on financial independence and connections to benefits/services that enhance financial stability
- c. Create appropriate/ongoing evaluation methods to become “highly effective, learning” organization
- d. Facilities Improvements
- e. Open evenings
- f. Encourage community(non-eligible) and family participation at cafe

3. Grow through Partnerships: *We would like to become a leader in creating more collaboration opportunities with other area senior centers, senior serving organizations, the local nonprofit and for profit community. Growth through partnerships will allow us to provide additional programs/services in a cost effective community supported manner.*

Action Items to be completed in order of priority:

- a. Explore partnerships with other non/for-profit community serving organizations offering similar programming
- b. Apply together for larger grants
- c. Research new program areas
- d. Share resources

4. Enhance Board/Staff/Volunteer Development Program: *To accomplish our mission we must have the right people with the right abilities to do what we want to do and get the outcomes we want at every level.*

Action Items to be completed in order of priority:

- a. Create competency based management system
- b. Develop volunteer coordinator position
- c. Institute annual board evaluation process
- d. Annual board/staff training/retreat