

# Strategic Plan – Fiscal Year 2015/2016

## MANAGEMENT OF REDWOOD COAST SENIORS, INC. A NON-PROFIT 501c3 CALIFORNIA CORPORATION

(This section of the plan deals with the management of the corporation, including governance, finances, fundraising, policies, and the establishing of responsibilities and priorities for the Executive Director)

### **Mission Statement**

The Mission of Redwood Coast Seniors, Inc. is to support optimal wellness and healthy aging for elders on the Mendocino North Coast by: operating a senior center providing appropriate activities and services; advocating for appropriate public policies, programs and funding; and effectively communicating positive quality of life information.

### **Board Governance (Board of Directors)**

Objective 1: to recruit, supervise, evaluate and set compensation for the Executive Director.

Objective 2: to regularly review and update the Mission Statement, Bylaws, and Policies of the Organization.

Objective 3: with the Executive Director to develop, review and adopt an annual Strategic Plan and Budget; to establish implementation priorities; and to regularly review progress.

Objective 4: to review all Contracts, Financial and Service Obligations and required Reports of the organization.

Objective 5: to provide an active, positive and informed representation of the Senior Center to the general public.

Objective 6: To regularly explore new visions and directions for the unfolding growth and improvement of both the Senior Center and Redwood Coast Seniors, Inc.

### **Organizational Management (Executive Director)**

Objective 1: to supervise, monitor, and provide consultation and direction to the Operations Manager, Social Services Manager, and Food Service Manager of the Senior Center.

Objective 2: to devise and implement a Strategic Plan for the overall operation of the Redwood Coast Seniors, Inc.

Objective 3: to devise a system of hiring, training, compensation, supervision, and personal relationship that results in a high level of performance by all paid and volunteer staff at the senior center.

Objective 4: to tend and encourage a level of personal comfort, trust, and cooperation that results in a high level of satisfaction and security for staff, volunteers and clients at the senior Center.

Objective 5: to provide staff resources to the Board of Directors in support of their of their mission of governance for Redwood Coast senior center.

Objective 6: to function as the primary representative of Redwood Coast Seniors, Inc to the general public, to venders and contractors, to contributors, and to staff, volunteers and clients.

Objective 7: To devise and implement fund raising activities to generate \$875,000 for fiscal year 2016 including: service contracts; fund raising events; donation solicitation; and grants.

Objective 8: With the board, to regularly advocate for public policies that support and enhance the mission of Redwood Coast seniors, Inc. of supporting joyful and fulfilling living, optimal wellness, and healthy aging for elders on the Mendocino North Coast Okay

## **Fund Raising (Executive Director/Board)**

Objective 1: to present fund raising meal events producing a net income of \$20,000.

Objective 2: to implement a donation solicitation system producing a net income of \$40,000.

Objective 3: to promote, encourage and collect meal donations of \$108,000.

Objective 4: to promote, encourage and collect bus fares of \$10,000.

Objective 5: to produce Thrift Store sales (net) of \$20,000.

Objective 6: to produce Adult Day Care service fees of \$40,000

Objective 7: to procure and execute Project Grants and Service Contracts generating fees of \$400,000.

Objective 8: with the Board of Directors, to design and implement a legacy fundraising program.

## **Financial Management (Executive Director/Finance Director)**

Objective 1: to implement and operate systems, policies, and procedures for payroll, receivables, payables, and cash management.

Objective 2: to generate all financial and business reports of the organization.

Objective 3: to prepare and monitor budgets for all contracts, and for Redwood Coast Seniors, Inc.

Objective 4: to analyze all insurance needs and policies for appropriate coverage and most economical cost.

Objective 5: to prepare monthly and year end financial reports and analysis for the Board of Directors.

Objective 6: to manage all governmental tax and licensing responsibilities for the Senior Center.

Objective 7: to provide ongoing financial analysis in support of the Executive Director's general management of the organization.

# **MANAGEMENT OF BEA ERICKSON SENIOR CENTER A PROJECT OF REDWOOD COAST SENIORS, INC.**

## **Senior Center Operations (Operations Manager)**

(This section of the plan deals with the operation of the Senior Center, managed by the Operations Manager who is responsible for the day-to-day delivery of services to clients, including: transportation; reception; thrift store; physical plant; social and recreational activities; and the collection and reporting of compliance data.)

### **Senior Transportation**

Objective 1: to deliver and an average of 900 rides per month throughout the service year.

Objective 2: to maintain all necessary licensing and reporting requirements at a high level.

Objective 3: to maintain high client satisfaction by simple efficient dispatching, and personal, high-quality driver service.

Objective 4: to fully inform the community about the nature and availability of the senior transportation program and availability of regional transportation..

Objective 5: to explore and implement strategies for maximizing efficiencies in all aspects of the transportation operation.

Objective 6: to maintain all busses and communication equipment in good working order and in compliance with all appropriate regulations.

Objective 7: to coordinate the transfer of ride request information to drivers in a manner that provides accurate and timely bus dispatch information.

Objective 8: To explore and implement methods to expand the geography, hours, and range of transportation services to clients, including improved regional transportation connectivity.

### **Reception/Front Desk Operation**

Objective 1: to handle all inquiries professionally, effectively, and in a kind and courteous manner.

Objective 2: to provide accurate response or routing for all incoming phone calls.

Objective 3: to handle all requests for transportation, accurately communicating appropriate dispatch information to bus drivers.

Objective 4: to receive, record, and accurately account for all incoming cash or checks and transmit appropriate information to the finance department.

Objective 5: to implement a system for marketing, booking and managing space rentals to external clients.

Objective 6: to initiate and facilitate the offering of a wide range of social and recreational programs in response to interests expressed by seniors.

Objective 7: to recruit and train and schedule MOW drivers, and provide daily updated delivery rosters.

## **Thrift Store**

Objective 1: to produce net sales of \$20,000

Objective 2: to recruit and train a volunteer staff to cover all shifts.

Objective 3: to create a warm, inviting, charming atmosphere in the store.

Objective 4: to procure, process and display donations and consignments of a sufficient quantity and quality of merchandise to support sales goals.

Objective 5: to plan and execute a marketing and promotions plan to maximize store traffic and sales.

## **Physical Plant**

Objective 1: to maintain the interior of the senior center at a high level of cleanliness and sanitation.

Objective 2: to maintain, repair and upgrade all mechanical equipment, hardware, and essential tools.

Objective 3: to maintain the exterior of buildings and grounds in a clean, attractive, and safe manner.

Objective 4: to develop a long-term physical maintenance and improvement schedule, and develop appropriate financial strategies to accomplish needed work.

Objective 5: to design, procure and implement appropriate technology systems to provide for adequate communication services relative to the operation of the senior center.

## **Data Collection and Reporting**

Objective 1: to devise, implement and update systems for collecting all required personal client data, service units delivery data, and facilities usage data.

Objective 2: to report all required data to contractors and licensing agencies.

Objective 3: to maintain all data entry as required by the “Q” AAA data base system.

Objective 4: to provide service unit billing information to accounting department monthly.

## **Senior Center Food Service** (Food Service Manager)

(This section of the plan deals with: the operation of the kitchen; delivery of food services to clients including congregate – dining room meals; food preparation and packing for meals on wheels delivery; and food and beverage service for special fund raising events.)

### **Dining Room Meal Service**

Objective 1: to provide lunches to 25,000 clients during the service year.

Objective 2: to plan and present special fund raising meal events.

Objective 3: to recruit, train and supervise both a paid and volunteer staff adequate to maintain a high level of service in the kitchen

Objective 4: to produce the lunch meals at a raw food and food service staff cost of \$2.50 per meal.

Objective 5: to implement job assignments and a work flow procedure to operate the kitchen efficiently and to meet food productions and service needs.

Objective 6: to maintain an average contribution of \$2.50 per meal per client.

Objective 7: to maintain and accurately measure a high level of client satisfaction.

Objective 8: to communicate effectively with clients regarding the menus, services and

policies of the dining room and to provide a systematic process for collecting feedback from clients.

## **Meals On Wheels Service**

Objective 1: to provide hot and frozen lunches to the homes of 15,000 clients during the service year.

Objective 2: to recruit, train and supervise a paid staff adequate to prepare and package meals for delivery.

Objective 3: to maintain temperature and food handling protocols to assure the safety of delivered meals.

Objective 7: to recruit, train and supervise a paid and volunteer staff adequate to deliver meals. (this may belong in the Operations Manager section – meals on wheels has three components – preparation/packing, delivery, and social services to clients).

Objective 8: to establish and maintain effective communication between the three managers relative to the mixed responsibilities and activities connected with meals on wheels.

## **Food Service Administration**

Objective 1: to provide monthly nutritional education to clients.

Objective 2: to devise and implement monthly menus that comply with contract requirements for nutritional standards.

Objective 3: to implement and document appropriate food safety and food handling procedures, including adequate staff and volunteer training.

Objective 4: to maintain compliance with all contract requirements of AAA, and satisfactorily fulfil all requirements for quarterly AAA Nutritionist Monitoring, and with Environmental Health Licensing Requirements.

Objective 5: to investigate new creative approaches to salad bar, hot entrée, menus, and food presentation that maximize the nutritional quality of senior meals, client satisfaction, and the reduction of waste per plate.

Objective 6: to order, receive, and adequately store all food supplies.

Objective 7: to procure and maintain all equipment, tools and utensils needed for the operation of the kitchen and dining room.

## **Senior Center Social Services**

### **(Social Services Manager)**

(This section of the plan deals with the providing of social services and personal support to clients, including: personal consultation and resource referral; educational programs; senior peer counseling; and adult therapeutic day care services.)

### **Senior Consultation and Education Services**

Objective 1: to effectively manage and respond to resource and services information inquiries from clients at the senior center.

Objective 2: to provide outreach assistance and information services to Meals On Wheels clients.

Objective 3: to maintain a comprehensive and up-to-date listing of resources and agencies providing support to seniors.

Objective 4: to present educational programs, displays, and information regarding topics of interest to seniors, in support of independent, joyful and healthy living.

Objective 5: to establish and maintain functional relationships with agencies and organizations serving seniors.

Objective 6: to facilitate the offering of a wide range of educational programs and support groups in response to identified needs, or interests expressed by seniors.

Objective 7: to recruit, train, schedule and supervise a volunteer consultation staff who will maintain a resources data base and provide direct consultation services to clients.

### **Senior Peer Counseling Program**

Objective 1: to provide approximately 500 hours of counseling to approximately 24 unduplicated clients during the fiscal year.

Objective 2: to recruit training and supervise 12 to 15 volunteer peer counselors.

Objective 3: to create and update a counselor training manual.

Objective 4: to attend most mental health board, and MHS a stakeholder meetings throughout the county.

Objective 5: to interview all potential peer counseling clients, evaluate their suitability for peer counseling, and supervise all counselor – client relationships.

Objective 6: to assist in developing a new contract for services with the county, and to provide all operational reports required by the contract.

## **Therapeutic Eldercare Service**

Objective 1: to provide an average of 18 client days of service per week (3 days per week operation) throughout the year.

Objective 2: to fully inform the community about the nature and availability of the service.

Objective 3: to recruit, train and operate a volunteer staff adequate to serve clients working with a paid staff coordinator.

Objective 4: to provide a safe, secure, intimate, kind, and appropriate environment for clients.

Objective 5: to coordinate client care with appropriate family members, agencies and other caregivers.

Objective 6: To provide compliance data and meet all licensing requirements relative to the operation of the Eldercare Service.