



ANCHOR-AGE CENTER, INC

FIVE-YEAR PLAN

2012 - 2017

Strategic Plan Process Summary

Overview

The following five-year plan describes six primary elements:

1. Why we are in business? - Provides history highlights; vision or future position and value, and mission that is the core of the Anchorage Senior Activity Center ("ASAC") and describes its purpose and uniqueness.
2. How do we do business? - Describes the ASAC's guiding principles that include the values that are the basis for determining decisions.
3. Where are we now and what factors may impact our mission? - Identifies the priority issues facing the ASAC as well as internal and External assessment insights.
4. Where do we want to be? - Identifies the strategic areas essential to the planning and overall operation of the ASAC. The five strategic areas include Board enrichment, Facilities and Equipment, Finance, Resources and Community Relations, and Programs and Services. The Goal of each area describes its direct support of the Center's mission. It is followed by a description of the End Result (where we want to be and what we want to achieve) and the Current Reality (where we are now.)
5. How will we get there? - The difference between where we want to be and where we are now was the basis for developing the goals and objectives for each strategic area. These goals and objectives include resource needs, a timeline and list of measurements and milestone action items.
6. How are we doing? - This priority step in the process is the linkage that ties together the elements of a strategic plan and turns a tabletop exercise into a continuous improvement program. It schedules the events that need to happen and insures conditions for success. It describes the monitoring and evaluation process and follows through actions that the ASAC takes to ensure success of the continuous improvement of programs, services, and overall operations.

One Develop and Review Why are we in business?

History

Reviewing Anchor-Age Center, Inc. history provides insights to the past and helps reveal the direction of the future.

Key Historical Issues

- Congress passed the initial Older Americans Act (OAA) in 1965 with the most recent amendment in 2006. The U.S. Congress will consider the reauthorization of OAA in 2011.
- The OAA set out specific objectives for maintaining the dignity and welfare of older individuals and recreated the primary vehicle for organizing, coordinating and providing community-based services and opportunities for older Americans and their families.
- In 1976 the Municipal Senior Citizens Advisory Commission was established and \$800,000 was appropriated for the Anchorage Senior Center from a 1978 State bond issue. The word **Activity** was added to the Anchorage Senior Activity Center (ASAC) in 2008 to more reflect what goes on at the Center.
- The ASAC was opened in 1983 and celebrated its 25th Anniversary in 2008. The Center is a Municipal owned facility of approximately 34,000 square feet on five acres of land. The Center is operated and managed for the Municipality of Anchorage through a contract with Anchor-Age Center, Inc, a non-profit corporation, which was established to specifically operate and manage the Center. Anchor-Age Center, Inc. is operated through a Board of Directors who are elected by voting members 55 years of age or older.
- Seniors in the Municipality of Anchorage area continue to be the fastest growing segment of the population.

Key Accomplishments

- The Center has over 2,300 paid memberships consisting of individuals over and under 55 years of age, as well as Corporations. Hundreds of people, primarily seniors, utilize the ASAC on a daily basis.
- The Endowment Trust Fund was established by the Anchor-Age Center Inc. Board of Directors in 1985. In the year 2000 it reached the \$2,000,000 initial goal and started to provide operating funds for the ASAC. The Trust Fund has provided \$454,820 from 2000

through 2010. The allocation of support funding is based on a formula similar to the Alaska Permanent Fund.

- The ASAC completed an 11,000 square foot expansion project in 2003.
- In 2008, the 25th anniversary year, the ASAC was accredited by the National Institute of Senior Centers and the National Council on Aging. There are only 188 Senior Centers in the nation that have achieved this high standard of accreditation.
- The ASAC encountered a very serious financial situation in 2008 due to a number of issues including a significant increase of \$100,000 in utility costs over two years. The crisis carried over to 2009 and \$100,000 had to be borrowed to keep the Center open in November and December of 2009. The ASAC was able to pay off the \$100,000 loan and establish positive margins in 2010 through careful management of costs, increased revenue activities and increased support from the Municipality of Anchorage.
- On a regular basis, the ASAC offers over 25 different programs and services ranging from fitness, social activities, food service programs, a gift shop and educational opportunities. These activities and uses of the ASAC include people of all ages and a diversity of the people living in our wonderful city of Anchorage, Alaska.

Vision

Anchor-Age Center, Inc. envisions a community that encourages, supports and optimizes enrichment opportunities and services for all Senior Citizens.

Mission

The mission of the Anchorage Senior Activity Center is to enhance the quality of life of seniors by managing a well-equipped facility with a skilled staff who promote fitness, health and social interaction in a wide range of activities and services.

Two Guiding Principles **How do we do business?**

Values/Culture/Climate

The Board of Directors, staff and volunteers are guided by the following values. They influence the way things are accomplished, as well as maintaining a healthy interpersonal and physical environment through:

- Encouraging and supporting independence and involvement
- Treating everyone with dignity and respect
- Encouraging and embracing inclusiveness
- Respecting confidentiality
- Collaborating among Board, Staff, Volunteers, and Community
- Providing a healthy, clean, warm and safe environment
- Expecting accountability from Board, Staff, Volunteers, and Community
- Honoring Equality of people
- Reflecting competency, dependability and financial stewardship

Three Impacting Factors

Where are we now and what factors may impact our Mission?

Priority Issues

Short Term

- Increases in the Anchorage senior citizen population
- Decreasing federal, state, and municipal funds
- Increasing competition for funding sources and declining corporate giving

Long Term

- Most short-term issues are also viewed as long-term issues. Additional long-term issues include:
- Perceptions of senior citizens and the aging population
- Community partnering with outreach to other senior facilities
- Keeping current with technology changes and impacts

Internal Assessment

Strengths

- Skilled and dedicated Staff, Board of Directors, and Volunteers
- Financial astuteness and stewardship with attention to administrative and contractual detail
- Sensitivity and adaptability to community and member needs
- Respected community image and cooperation with other agencies

Developmental Opportunities

- Seniors involvement in the Center and Municipal projects
- Business and strategic planning including the Endowment Trust
- Board diversity limited by the minimum 55 years of age requirement
- Job training and keeping current with technological advances
- Innovative solutions to public relations, fundraising challenges, long-term funding and endowments

- Defined organizational structure with clear Staff and Board of Director roles and responsibilities

External Assessment

Opportunities

- Greater demand for use of the Senior Activity Center
- Perception of seniors value added in the community
- Community awareness increasing partnering and alliances
- Planned giving and fundraising opportunities

Challenges

- Decreasing revenues and increasing competition for funds
- Providing senior population with access or transportation to the Center facilities and services
- Providing adequate programs and services for seniors
- Changes in governmental programs that affect seniors.

Four Planning Base Where do we want to be?

Strategic Areas and Goals

The following areas are essential to the planning and overall operation of the Anchorage Senior Activity Center. The five strategic areas include Enrichment; Facilities and Equipment; Finance; Resources and Community Relations; and Activities, Programs and Services. The goal of each area describes its direct support of the Center's mission. It is followed by a description of the End Result (where we want to be and what we want to achieve) and the Current Reality (where we are now.)

Enrichment

Ensures Board development; alignment with Center's mission; and linkage between service and organizational effectiveness to include training, planning, personnel, membership, policies and procedures.

End Result

Anchor-Age Center Inc. has an eleven-member Board of Directors. Board members' roles, responsibilities, and expectations are clearly defined. A training manual is provided to new board members. The Board's primary function is as a policy-making and financial management body.

The Executive Committee and three other standing committees (plus additional supportive sub-committees with ad-hoc committees designated as necessary) each representing a specific strategic area, provide Board and Staff with a forum for planning and making recommendations. There is staff input on all committees except the Executive Committee.

Standing committee functions are clearly defined with measurable goals and objectives. A planning process is in place. Each strategic area has goals and objectives that focus on outcomes, identify milestone action items, designate resources and project a timeline. Quarterly monitoring and an annual self-evaluation ensure this continuous improvement process.

Current Reality

Anchor-Age Center has an eleven-member Board of Directors with three standing committees, additional sub-committees, ad-hoc committees and an Endowment Trust. The Bylaws specify that all Board members must be members of the Center. Committee membership is outlined in the bylaws. There is a written planning and evaluation process in place. The five-year plan consists primarily of routine operational action items and is an annually repeated checklist.

Facilities and Equipment

Mission

To provide clean, safe, attractive, dependable and fully functional interior spaces, furniture, equipment, building systems, and grounds as appropriate for the primary user group in support of Anchor-Age Center's scheduled events, programs, routine gatherings, and employees.

Contractual Relationships and Obligations

The Anchorage Senior Center building and grounds are owned by the Municipality of Anchorage. The Municipality contracts with Anchor-Age Center Inc., an Alaska non-profit corporation, to operate and perform day-to-day maintenance. Repair and building equipment replacement are the responsibility of the Municipality. Anchor-Age Center is in compliance with the terms of the operation contract.

Facility Assessment and Status

The 23,000 square foot Anchorage Senior Center was constructed in 1983 with a major 11,000 square foot addition completed in 2003. The landscaped site consists of five acres, three structures (the Activity Center, an appurtenant structure, and the maintenance shop building), and parking for 110 vehicles.

The original building and equipment has endured 25 years of full use and system and building equipment failures are becoming more routine. Maintenance has been deferred or ceased on a number of equipment items.

Responsibility for the replacement of identified deficient equipment may be negotiated between Anchor-Age Center and the Municipality of Anchorage to accelerate resolution. A FY2011 grant from the state will be used to replace much of the missing or un-repairable equipment.

Anchor-Age management has also identified certain improvements that need to be made to the site and buildings in order for the facility to accommodate existing and future user needs. These improvements must also be prioritized and funding sources determined.

Finance

Develop and maintain all financial records, reports, and budgets for both the Anchor-Age Center, Inc. (which manages the Anchorage Senior Activity Center), and the Endowment Trust Fund.

End Result

The Anchorage Senior Activity Center is a program and service driven agency. Individual programs and services generate their own budgets, identifying and accessing their own funding resources. These budgets reflect all operating, administrative and service expenses.

The financial database generates all individual program and service composite records, reports, and budgets including facilities inventory control.

Finance works closely with and supports each strategic area to ensure fiscal accountability. It also provides support to the Endowment Trust as needed. The annual budget reflects both long and short-term expenses for operating the center and providing sustainability of activities, programs and services that support the operations of the Center.

The Center maintains a 6-month operating reserve.

Current Reality

The Finance Committee, a contract accountant, a bookkeeper and assistant bookkeeper are responsible for all financial accountabilities. Approximately 75% of required reports and records are database generated. Other reports and records are manually generated. Budgets are projected and driven by contract, grant funding, and by estimated revenue from income generating activities based on prior year history. The Center does not currently maintain an operating reserve.

All income generating activities such as the Arctic Rose Restaurant and Catering, grants, contracts, room rentals, classes, social activities, donations, memberships, etc., as well as calculated allocations from the Endowment Trust Fund, are the Center's base source of revenue and support.

Resource and Community Relations

Continue to develop a broad base of public and private funding support. A sustainable long range-funding base is critical to the success of all the programs, activities, maintenance and operations of the current facility. The Anchor-Age Senior Center Endowment Fund (“The Trust”) is a key element of the long range-funding plan. Community awareness, public relations and marketing of the Anchorage Senior Activity Center (ASAC) to encourage inclusion and promoting involvement of all seniors and other members of our community is critical to success, now and into the future, of the ASAC.

End Result

Resources and Community Relations are linked to the extent that the success of ASAC is a direct relationship between the community and the resources needed to provide the funding required to adequately operate the Center. Resources include funds from Federal, State and Municipal grants. These funds must increase at least as much as the annual cost of living in order to maintain the current level of services. Additional funding, amounting to \$1Million to \$1.5 Million , must be generated by ASAC staff, who are responsible for scheduling monthly fund raising events, marketing the events, and ensuring good public relations that will result in financial support. Resources from private foundations, grants and volunteer coordination will provide additional direct funding and in-kind resources. The Endowment Trust Fund will grow in value to provide increased operating funds from the current 6% to 12%. The Anchor-Age Center Inc. Board of Directors and the Endowment Fund Board of Trustees will have 100% gift participation. The Advisory Board will be encouraged to have 100% gift participation.

The Community will be informed of all events by publishing an annual calendar of events, monthly newsletters and special brochures. Special events will be advertised by using targeted mailing lists (regular and e-mail) to reach specific groups that would have an interest in specific special events. All of these events will focus on raising money and in-kind services.

An outreach to the community to increase revenue from the catering and restaurant services from 37% to 50% of the ASAC total operating budget.

Resources and Community Relations has a clear well-defined plan that identifies goals, objectives, resource requirement and timelines. Its direction is clear and aligned to the mission and linked with other strategic areas.

Current Reality

The current revenue sources, based on the ASAC approved 2010 budget, are grants (Federal, State and Municipal) 33%; restaurant and catering services 37%; gift shop, gaming and rentals 13%; membership dues and miscellaneous fees 11%; Endowment Trust Fund 6 %.

This represents a diverse and broad based source of funding to support the operations of the ASAC. A non-cash component of the success of the ASAC is the tens of thousands of volunteer hours of direct services provided by members and other groups in the community.

The Endowment Trust Fund, with its own Board of Trustees appointed by the Anchor-Age Center, Inc. Board of Directors, was established in 1985 to create a long-term source of stable funding for the operations of ASAC. Funding from the Trust to support on-going ASAC operations is based on a percentage of the five-year average of the total fund value. Since the year 2000, the Endowment Fund has provided almost \$500,000 to the ASAC for daily operations. Planned giving is available to support the Endowment Fund through wills, bequests, insurance gifts, real estate and any amounts of cash donation.

Community relations currently focuses on developing numerous cooperative working relationships with other agencies that provide support to seniors in our community. The ASAC provides a broad range of activities and programs for seniors to promote and enhance the quality of life, which includes fitness, health and social interaction. Awareness of all the different activities at the ASAC is coordinated and presented through the Web site, monthly newsletter (Senior Borealis), outreach to media sources, Board and staff advocacy and numerous flyers and brochures.

Programs and Services

Provide quality holistic programs, services, and opportunities to include fitness and social activities; educational, legal, medical, health, housing, transportation, and financial services; and general outreach and information exchanges.

End Result

The Anchorage Senior Activity Center ("ASAC") provides programs and services in four major areas including social activities; preventative and maintenance health services; physical activities; and information and assistance. In addition to enhancing the quality of life for people ages 55 years and older, the Center provides the community with resources including a variety of multi-purpose event and activity facilities, food service, newsletters, and a gift shop which offers for sale donated items as well as hand-crafted gifts made by senior citizens.

Programs and services match the expectations of the senior population and community in general. Accessibility to facilities, programs, services and information is readily available to all through a wide variety of sources.

Gender and ethnicity in all Municipal operations and projects proportionately represent the senior population. The Center serves as a resource for other agencies and enterprises seeking the expertise available through Anchorage Senior Activity Center members.

Programs, services, and activities are evaluated regularly and revised as necessary to maintain compliance with the Municipality management agreement and meet the needs and expectations of the community in general and senior population in particular. A summary of evaluation survey results is published and highlights key issues and recommendations.

Current Reality

Programs and services are available to all members although many services and activities are open to all. Membership to the Center is categorized into the following:

- *General - (Ages 55 and over)*
- *Associate - (ages 18 - 54)*
- *Business*
- *Non-Profit*
- *Lifetime*
- *Low-Income (to accommodate Seniors with income below the poverty guidelines)*

A Membership Coordinator performs duties related to membership. A monthly newsletter, the Senior Borealis, is mailed to members and is full of information on the various activities of the Center.

The ASAC is open 5 days a week from Monday through Friday, and during special and catering/rental events. The Center has rooms available for a variety of functions and activities. Room rentals and catering activities are major sources of revenue for the Center.

Other features of the ASAC include a restaurant open on weekdays for lunch and a gift shop offering for sale items hand-crafted by the Center members.

Preventative Health Services, staffed by personnel under the State of Alaska's Nutrition, Transportation and Support grant, presents programs to promote health and wellness. The Fitness Department, headed by a Fitness Manager, offers physical activities to help keep the body active and agile. This department is charged with the maintenance and use of the Fitness Room, Weight Room and the Aerobics Room.

Arts and Sciences are also developed at the ASAC. Computer classes are offered in the Computer Laboratory. The Art Room hosts art-related activities such as painting classes. Dance, Choir and Drama groups offer fitness and social opportunities.

ASAC collaborates with various agencies and companies to promote socialization, learning and well-being of Seniors in so many different aspects. Seminars, classes and other events hosted by the Center and/or different organizations are offered to Seniors.

ASAC offers all activities, programs and services in a professional manner with tolerance and acceptance to the Municipality's diverse culture.

Five Implementation How will we get there?

Enrichment

Ensures Board development; alignment with Center's mission; and linkage between service and organizational effectiveness to include training, planning, personnel, membership, policies and procedures.

Goals and Objectives

Measurements and Milestone Action Items	Responsibility	Timeline
1 Assess and revise the five-year Plan <ul style="list-style-type: none">○ Include 6 primary elements (overview, guiding principles, impacting factors, planning basis, Implementation, and evaluation○ Include 5 strategic areas (Enrichment; Facilities/ Equipment; Finance; Resources/Community Relations; and Programs/Services○ Develop and implement revisions as needed	Strategic Planning Committee	Annual Report 1/2012 - 1/2017
2 Define a strategic planning process <ul style="list-style-type: none">○ Timeline and delegate each action item	Strategic Planning Committee	Annual Report 1/2012 - 1/2017
3 Review and revise (as needed) the Bylaws <ul style="list-style-type: none">○ Ensure consistent and strategic alignment of the Corporation, its organization, mission, Bylaws and operation○ Review and revise Bylaws	Bylaws/Standing Rules Committee	Annually 7/2012 - 7/2017
4 Ensure continuing Board diversity and proficiency <ul style="list-style-type: none">○ Identify desirable skill sets and potential recruitment opportunities○ Clarify board members roles, responsibilities, and expectations○ Identify potential development opportunities/Board Training	Board of Directors	Annually 6/2012 - 6/2017 On-going
5 Support each strategic area through the planning process <ul style="list-style-type: none">○ Ensure each strategic area has its own mission that is aligned with that of the Center	Strategic Planning	As needed
6 Operate and manage the Center realistically, efficiently, effectively <ul style="list-style-type: none">○ Maintain and annually review an administrative plan (organization chart, job descriptions, policies and procedures), budget, financial management system○ Comply with MOA Contract Agreement	Executive Director	On-going

Facilities and Equipment

Operate and provide preventative and routine maintenance of the building, equipment, grounds and parking areas. Responsibility for the maintenance and repair of the facility and equipment is set forth in the contract executed by the Anchor-Age Center, Inc. and the Municipality of Anchorage on 12/09/2010.

Goals and Objectives

	Measurements and Milestone Action Items	Responsibility	Timeline
1	Develop and maintain an Inventory Control Plan <ul style="list-style-type: none">○ Maintain inventory database and track inventory○ Identify and code ownership of all inventoried items○ Update Plan on 2-Yr Cycle	Facility&Eqpt Comm/ Executive Director	9/2012 9/2014
2	Expand the Center facility <ul style="list-style-type: none">○ Develop expansion plan to include milestone action items, resources, budget, timelines, impact on existing operations, etc.○ Acquire funding and implement plan	Board of Directors/ Exec Director/Facility& Equipment Committee	1/2014
3	Ensure MOA Contract compliance <ul style="list-style-type: none">○ Review Facility Use Plan and revise as needed○ Review Fire, Safety and Security Plan and revise as needed	Board of Directors/ Executive Director	1/2014
4	Optimize operation and maintenance of the facility <ul style="list-style-type: none">○ Evaluate with MOA recommended replacement schedule for HVAC, electrical, fire detection and prevention, etc.○ Evaluate with MOA recommended service requirements provided within the facility, develop plans and schedules as required○ Identify and recommend to MOA furniture, equipment, physical requirements; costs; and replacement and maintenance schedules	MOA/Exec Director Facility&Eqpt Comm	Qtrly
5	Provide a safe, warm, clean and friendly environment for persons participating in programs or activities at the Center <ul style="list-style-type: none">○ Provide annual training of staff in Fire, Safety and Security Plan○ Comply with MOA Contract Agreement	Executive Director	On-going Annual On-going

Programs and Services

Provide quality holistic programs, services, and opportunities to include fitness and social activities; educational, legal, medical, health, housing, transportation, and financial services; and general outreach and information and referral.

Goals and Objectives

	Measurements and Milestone Action Items	Responsibility	Timeline
1	Develop opportunities to enhance public awareness of seniors <ul style="list-style-type: none"> ○ Develop and implement plans ○ Maintain member advisory group 	Committee/Program/ Exec Director/ Community Relations	1/2012 - 1/2017 On-going
2	Optimize, enhance and diversify programs and services as needed <ul style="list-style-type: none"> ○ Measure program/service outcomes (actual benefits or changes) ○ Ensure survey/assessments tools identify member needs ○ Publicize results, issues and response action items as needed 	Committee/Program/ Exec Director/ Community Relations	1/2012 - 1/2017 On-going
3	Provide seniors with fitness and social activities, services, programs and opportunities <ul style="list-style-type: none"> ○ Fitness and social activities ○ Educational, legal, medical, health, housing, financial services ○ Publicize results, issues and response action items as needed ○ General outreach, referral, and information exchange 	Committee/Program/ Exec Director/ Community Relations	On-going
4	Maximize and diversify collaborations and in kind services <ul style="list-style-type: none"> ○ Maintain an area-wide network with program and service providers that also support the senior population ○ Identify prospective alliances and form partnerships 	Committee/Program/ Exec Director/ Community Relations	On-going
5	Provide a safe, warm, clean and friendly environment for all persons participating in programs or activities at the Center <ul style="list-style-type: none"> ○ Survey, evaluate and revise as needed ○ Comply with MOA Contract Agreement 	Committee/Program/ Exec Director	On-going Annually On-going

Finance

Develop and maintain all financial records, reports, and budgets for Anchor-Age, Inc.

Goals and Objectives

	Measurements and Milestone Action Items	Responsibility	Timeline
1	Monitor Endowment Fund	BOD/Trustees	1/2012 - 1/2017
	<ul style="list-style-type: none"> ○ Ensure alignment with Five-year Plan and Bylaws ○ Determine amount of annual distribution availability ○ Request amount needed for Operations if needed 	Trustees Board of Directors	Annually 12/2012 - 12/2017 Annually
2	Develop and maintain an Inventory Control Plan	Executive Director/ Accounting/Facilities Maintenance	1/2012 - 1/2017 On-going 10/2012
	<ul style="list-style-type: none"> ○ Identify and code ownership of all inventoried items ○ Develop database-generated reports ○ Monitor inventory database and track inventory ○ Report to Board of Directors 	Finance Committee Executive Director	Review Qtrly 11/2012 - 11/2017
3	Optimize financial database	ED/Accounting/ Finance Committee/ Treasurer	1/2012 - 1/2017 Annually
	<ul style="list-style-type: none"> ○ Overall responsibility ○ Assess computer, software, and database requirements for records, reports, budgets, and projected upgrades ○ Develop and implement an acquisition plan as needed 		As-needed
4	Support each operational area to ensure fiscal accountability	ED/Finance Committee/Accounting	On-going Annually
	<ul style="list-style-type: none"> ○ Review and revise each departments budget as needed ○ Track each departments income and expenses ○ Prepare annual operating and annual capital budgets ○ Review and approve the annual budgets ○ Review and accept the annual independent audit report 	Accounting Executive Director Finance/Board of Directors	On-going 9/2012 - 9/2017 10/2012 - 10/2017 Annually
5	Establish and maintain operating reserves	ED/Finance Committee/Accounting	1/2013 On-going
	<ul style="list-style-type: none"> ○ Ensure budgets reflect long and short-term expenses, and capital and operating projects ○ Review and revise annual budget as needed ○ Maintain retained earnings savings account of 5% of the annual operating budget 	Finance Committee	Annually 12/2012 - 12/2017
6	Operate and manage the Center effectively, realistically and efficiently	Executive Director	On-Going
	<ul style="list-style-type: none"> ○ Generate sufficient operating revenue to offer a comprehensive array of services and activities ○ Comply with MOA Contract Agreement ○ Report status to Board of Directors 	Executive Director	11/2012 - 11/2017

Resources and Community Relations

Develop a broad base of public and private funding for programs, services, facilities and equipment while promoting and developing the Endowment Trust, escalating community awareness, public relations, and marketing, encouraging inclusion and promoting involvement.

Goals and Objectives

	Measurements and Milestone Action Items	Responsibility	Timeline
1	Maximize and diversify resources (funding, collaborations, volunteers) <ul style="list-style-type: none"> ○ Identify potential donors (individuals, service providers, educators, faith community (etc.) and increase database by 3% annually ○ Identify potential partnerships, collaborations, and alliances (in-kind services, volunteers, internships, etc.) ○ Market "outside events" including guidelines for those events 	Fundraising Committee/Exec Director Membership-Public Relations Com/ED	On-going On-going
2	Expand and enhance Volunteer Service <ul style="list-style-type: none"> ○ Maintain a Volunteer recognition program ○ Maintain a catalog of Volunteer opportunities ○ Update and maintain the Volunteer training program 	Executive Director	6/2013
3	Provide Ambassador training to ensure an adequate pool of advocacy resources to network on behalf of the Center <ul style="list-style-type: none"> ○ Develop an Ambassador training program ○ Maintain a catalog of Advocates and network opportunities 	Membership-Public Relations Committee/ Executive Director	On-going
4	Assess fundraising event plan and revise as needed <ul style="list-style-type: none"> ○ Sponsor five fund-raising events and one Signature Event ○ Maintain a net to gross fund raising ratio of 85% ○ Research two new opportunities, implement if favorable and report to Board 	Fundraising Committee/ Treasurer	6/2013 Annually
5	Assess Revenue Generating Events <ul style="list-style-type: none"> ○ Increase net revenue generating event or activity by 3% 	Exec Dir/ Treasurer	6/2013
6	Maximize community awareness of Center opportunities and services; senior's skills and interests of; promote a positive perception of seniors <ul style="list-style-type: none"> ○ Disseminate information about Center programs and activities ○ Make space available to community groups ○ Participate in professional networking meetings ○ Review/Plan to increase membership/diversity based on percentage of 55+ seniors in community population ○ Implement plan to increase membership 	Membership-Public Relations Committee/ Executive Director Membership-Public Relations Committee	On-going 6/2012 - 6/2013
7	Promote member involvement in Center and programs <ul style="list-style-type: none"> ○ Promote opportunities in monthly newsletters ○ Member Survey of Programs and Services ○ Quarterly Forums and Advisory Council 	Executive Director Advisory Council	On-going Annually (October) Quarterly

SIX REVIEW

How are we doing?

Implement/Monitor/Update

This priority step in the process is the linkage that ties together the elements of a five-year plan and turns a tabletop exercise into a continuous improvement program. It schedules the events that need to happen and ensures conditions for success.

<u>Planning/Evaluation Process</u>	<u>Who</u>	<u>Timeline</u>
<ul style="list-style-type: none">• Complete and summarize Board of Director and strategic area self-assessments and evaluations.	All	Feb/Mar
<ul style="list-style-type: none">• Complete and summarize member and client surveys of their perceived needs and effectiveness of services provided.	Areas	Apr/May
<ul style="list-style-type: none">• Identify and summarize gaps between needs and services from completed surveys and assessments. Combine results identifying /highlighting issues, demographics, and potential impacts.	Areas	May/Jun
<ul style="list-style-type: none">• Distribute summaries, assessments, etc. to the Enrichment Committee for consolidation.	Areas	June
<ul style="list-style-type: none">• Draft work session agenda and consolidate recommended Plan revisions.	Enrichment	Jul/Aug
<ul style="list-style-type: none">• Conduct a planning work session to review, evaluate and revise the plan as needed; i.e., identify duplicities, resources, and priorities	All	Sep/Oct
<ul style="list-style-type: none">• Finalize and distribute updated Five-Year Plan	Enrichment	Nov
<ul style="list-style-type: none">• Implement plans and conduct quarterly reviews (update as necessary) to ensure and evaluate status. (Apr, Jul, Oct)	All	Jan