

# Strategic Plan

**for Fiscal Years 2023-2025**

Board Approved September 14, 2022

**north shore senior center**

# FY23-25 Strategic Plan Overview

## Mission:

To foster the independence and well-being of older adults, enhance their dignity and self-respect, and promote their participation in and contribution toward all aspects of community life.

## Core Values:

Share a Purpose  
Embrace Diversity  
Take Responsibility  
Pursue Excellence  
Act with Passion

## Strategies:

**Talent** – Invest in employees, volunteers, and boards so NSSC is nimble, responsive, fiscally sustainable, and able to meet future community needs.

**Technology** – Identify critical future needs that reflect strategic and financial stewardship and effective delivery of programs and services.

**Telling the Story** – Function as a thought leader convening internal and external conversations and activities related to aging and aging services.

**Diversity, Equity & Inclusion** – Incorporate DE&I holistically and consistently throughout each area of focus ensuring NSSC has true representation of the people and communities it serves.



## Summary & Acknowledgments

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North Shore Senior Center (NSSC) developed this three-year strategic plan (FY23-FY25) to guide the organization from the challenging years in the throes of the COVID-19 pandemic into a strong and sustainable future. Building on the past, we must continue to deliver best-in-class services and programs which produce clear and positive outcomes for the benefit of our participants, volunteers, donors, employees, and community stakeholders who invest their time, talents, and resources with us.

We are thankful for the many stakeholders who joined focus groups, completed surveys, or participated in meetings and interviews to share their insights. We have carefully reviewed their ideas and united them with the data collected from countless sources in crafting our strategic framework and action plans.

We are especially grateful to the strategic planning committee members for their time and lively engagement in this effort, and for our skilled and dedicated consultant, Becky Frederick, for her tireless guidance and support.

This is an ambitious three-year plan which, when achieved, will secure a strong and sustainable future for NSSC. It enables innovation and transformation, allowing our organization to continue to meet the needs of older adults and their families in all the communities we serve. It also strengthens our 65-year foundation and creates the platform from which to build toward our 75<sup>th</sup> anniversary in 2031 and beyond.

Respectfully,  
Tish Rudnicki, MSW  
Executive Director & Board President

### Board of Directors

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## Introduction

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North Shore Senior Center (NSSC) was founded in 1956, its beginnings rooted in the post-World War II era. The organization received its non-profit charter on June 29, 1956. NSSC began with 6 staff members in 1 room in the Winnetka Community House. Today, its 103 employees serve more than 24,000 individuals in over 25 communities in Chicago's northern suburbs and beyond.

Its rich history, as a focal point for providing essential services, programs, and activities to older adults and their families, is the foundation upon which this current strategic thinking and planning process was designed. There is an intentional effort to recognize the strengths and decades-long experience of NSSC while acknowledging the need to continue its evolution as a vibrant, relevant, and sustainable community-based organization.

The COVID-19 pandemic forced the organization to learn how to serve its community in ways it had never dreamed. Although the pandemic impacted operations across the organization, its team of dedicated professionals quickly adapted to continue serving its vulnerable older adult population through virtual programming, telephonic and telehealth case management and counseling, and drive-through events. NSSC also hosted a vaccination clinic, protecting 460 older adults and their caregivers against the virus.

NSSC has built on the lessons learned from the pandemic as it envisions the future where technology and multiple points of access provide increased opportunities to serve older adults and their families.

## Strategic Thinking & Planning Process

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The Strategic Planning Committee (SPC) was established by the Board of Directors for the purpose of assisting the board in fulfilling its strategic planning duties. The SPC collaborated closely with a consultant to develop the strategic thinking and planning process; establish key timelines and deadlines; provide oversight to the project plan and activities; and ensure that multiple community voices and perspectives were heard throughout the process.

The SPC relied on NSSC's Leadership Team for both content and context – in terms of both internal and external data collection and environmental scans. Through various discussions and meetings, the SPC developed **three strategic areas of focus: Talent, Technology, and Telling the Story**. There is a golden thread of commitment to **Diversity, Equity, and Inclusion (DE&I)** woven throughout the actions identified in the strategic plan.

The SPC was responsible for developing the strategic plan that was presented to the Board of Directors for review, reflection, and building consensus. In September 2022, the board approved a strategic plan that identifies three core strategic directions to guide

NSSC for the fiscal years 2023 through 2025. These three strategic directions recognize NSSC's commitment to its current work and provide the flexibility and guidance for redefining the future of the organization while making a bold commitment to increase the participation of diverse communities and individuals; advance equitable practices and processes; and enhance inclusion and accessibility.

## Assumptions

Based on its research, data analysis, and conversations with stakeholders, the SPC has made the following assumptions when drafting this strategic plan.

### *Assumption #1*

- This strategic plan will cover a 3-year period with distinct activities for each of the 12-month periods, although some activities will overlap into multiple years. The first 18 months will be foundational work for bolder action in the second phase of the plan.

### *Assumption #2*

- The framework will be reviewed regularly by board and staff with a formal assessment on an annual basis and re-alignment as needed.

### *Assumption #3*

- There is a strategic opportunity to begin to lay the groundwork for the 75<sup>th</sup> anniversary (2031) as bold change will take time, resources, and commitment.

### *Assumption #4*

- We will be serving a broader range and segmentation within the older adult population. Demand for programs/services to specialized populations will rise – younger older adults, intergenerational, chronic disease management, etc.

### *Assumption #5*

- Change and growth, driven by increasing demand for services as well as technological and cultural shifts, are critical factors to the future of NSSC. In response, NSSC will develop a sustainable business model that increases revenues and promotes efficiency.

*Assumption #6*

- Workforce and workplace changes will require a re-evaluation of staff compensation and benefits to retain and attract the skills and talents we need, as well as match the culture and values of NSSC.

*Assumption #7*

- The organization's story and footprint go far beyond the building and its designation as a senior center, which provides an opportunity to raise awareness that it is a broader community center and resource.

*Assumption #8*

- NSSC has the reputation and expertise to be a thought leader and convene a larger community around a reframed concept of aging and aging services.

*Assumption #9*

- Investment in human capital must be a priority and reflect what employees will need in the future.

*Assumption #10*

- Board recruitment and engagement will need to evolve; the organization will pursue a broad spectrum of candidates to enhance board effectiveness in addressing future opportunities.

*Assumption #11*

- Diversity, equity, and inclusion is the golden thread throughout all elements of the strategy – talent, community awareness and participation, board representation, creating and maintaining an accessible and inviting experience, Reframing Aging, Changing the Narrative, etc.

*Assumption #12*

- Change needs to be bold and can be achieved through a disciplined approach to protecting and growing the assets of the organization – financial, its employees, its place in the community, and its reputation – locally, regionally, and beyond.

## Board Oversight & Review

The Board of Directors recognizes that the external environment continues to change at a rapid pace and understands that it will need to evaluate this strategic plan on an annual basis and make adjustments as needed. An annual review of the strategic plan will be added to the calendars of both the Leadership Team and the Board of Directors.

- The strategies and goals contained in this strategic plan are divided into three phases. Objectives are designed based on a 12-month cycle, although certain activities will overlap between the phases.

*Year 1 – Securing the Future*

*(September 15, 2022 to June 30, 2023)*

*Year 2 – Designing for Future Needs*

*(July 1, 2023 to June 30, 2024)*

*Year 3 – Enabling Innovation and Transformation*

*(July 1, 2024 to June 30, 2025)*

- The strategic planning process is based on extensive stakeholder participation through surveys, personal interviews, and facilitated planning sessions. Much of the language in the resulting plan is the actual language of key stakeholders.
- Action steps, deliverables, and budget implications have been identified for Year 1 in this strategic plan. These activities build the foundation for Years 2 and 3. In the Spring of 2023, action steps, deliverables, and budget implications will be identified for Year 2.

## Mission, History & Core Values

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### Mission

The mission of NSSC is to foster the independence and well-being of older adults, enhance their dignity and self-respect, and promote their participation in and contribution toward all aspects of community life. NSSC is one of more than 15,000 senior centers in the United States that provides a comprehensive strategy to meet the needs of older adults, their families, and caregivers. Through multiple doors and access points, NSSC offers a broad suite of services including social services, specialized care for people living with dementia, private care management, counseling, personal money management, educational and wellness programs, and volunteer opportunities.

## History

Mirroring the post-WWII national trend to consider the growing population of older adults and their need for socialization, purpose, and support, communities on Chicago's North Shore held meetings and workshops, and formed the Committee on the Older Adult. The Committee eventually found a home at the Winnetka Community House. The 8-person, all-women Board of Directors held its first meeting on May 22, 1956 and received its non-profit charter on June 29, 1956. Initial membership was 30, made up mostly of women who met in people's homes and made layettes for the Infant Welfare Society.

The Senior Center officially opened its doors in Room 203, known as the "Lounge," in the Winnetka Community House on December 3, 1957. The staff included a part-time group activities worker, a part-time social worker, and a secretary. The first classes included arts, crafts, singing, play reading, book reviews, and current events discussions.

Janet Burgoon was hired as the first Executive Director and, seeking to get more men involved, she convened a meeting of 9 men. The result was the formation of the NSSC Men's Club with 15 members, which held its first meeting on December 3, 1957.

In 1963, the organization officially adopted the name North Shore Senior Center.

North Shore Senior Center clearly filled a need in the northern suburbs. By 1958, there were more than 300 members from Wilmette to Highland Park. As NSSC grew, activities were added. Members' community service projects expanded, and volunteer opportunities grew—both at the Center and in the community. By 1972, membership had grown to 700 people with over 50 activities each week. More than 3,700 individuals were served with counseling, information, and referrals. A major gift helped NSSC move to larger quarters within the Winnetka Community House. The additional space allowed for more and larger programs and events, including the first Annual Super Senior Day celebration that year.

The passage of the Older Americans Act in 1965 was a boon to the organization, providing opportunities to expand programs and services to the community. A grant made it possible to increase staff for this purpose. Social Services expanded immensely in the 1970s with counseling, friendly visiting, and becoming an official Information and Referral Center for the Suburban Area Agency on Aging. Over the years, Social Services continued to expand with conferences on aging, Dial-a-Ride, Chore Services, respite and caregiver programs, elder abuse assistance, and other programs.

In 1983, House of Welcome Adult Day Services (HOW) opened for both individuals with memory loss and their caregivers.

In 1991, NSSC moved to the New Trier West High School campus. At this time, the Center had more than 2,500 members, 600 volunteers, and served over 17,000 individuals in 19 communities. In 1998, NSSC received notice it needed to relocate to accommodate a growing high school population. After a long search and successful fundraising campaign, a new home was found: a warehouse with 40,000 square feet of space was remodeled to include classrooms, meeting spaces, an art studio, and offices as well as an auditorium, fitness center, library, café, and gallery. NSSC officially opened its doors at the A.C. Nielsen, Jr. Campus on September 5, 2000.



In 2003, NSSC was awarded accreditation by CARF in recognition of outstanding quality of services provided. It received its 6<sup>th</sup> consecutive accreditation in 2019. In 1997, NSSC received its first accreditation by the National Institute of Senior Centers (NISC) in recognition of its quality operating standards and broad offering of programs. In 2008, NSSC was recognized as a New Model of Senior Center by NISC, noting its multidisciplinary approach to serving older adults and the community.

Over the years, programs and services have changed to meet the needs and demands in the area and have also been offered in other locations, such as Morton Grove, Niles, Evanston, Glencoe, and Wilmette. Over time, NSSC absorbed many of these other organizations to further grow and expand operations and offerings.

## Core Values

NSSC is committed to the following Core Values which guide the work of the employees, board, and volunteers:

- Share a Purpose
- Embrace Diversity
- Take Responsibility
- Pursue Excellence
- Act with Passion

## Scanning the Environment

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Data gathered from both internal and external sources informed the strategic directions outlined in this plan including NSSC internal reporting; individual interviews with board and staff members; feedback from participants, caregivers, volunteers, donors, and funders; and research of best practices.

### Significant findings include:

- NSSC's breadth and depth of services is unparalleled and includes social services (support groups, older adult benefits, tax aide, escorted transportation, help in the home, friendly visiting, information and referrals, lending closet); specialized care for people living with dementia; private care management; therapy and counseling; personal money management; Lifelong Learning educational and wellness programs; and volunteer opportunities.
- Through its 103 employees, NSSC serves and engages more than 24,000 individuals in over 25 communities. More than 21% of employees have been working at NSSC for 10+ years. Employees have a presence in Northfield, Nilus, Evanston, Glenview, Highland Park, and 6 area hospitals.
- The NSSC Leadership Team has a collective 170+ years of experience and expertise covering health insurance, human resources, finance, social services, geriatric care, health and wellness, mental health, marketing and communications, public relations, small business ownership, development, public education programming, and management consulting.
- Programs and services are provided to participants and members who speak more than 25 languages. NSSC employees speak 10 languages, in addition to English.
- In 2021, 74% of individuals served through Senior & Family Services, House of Welcome Adult Day Services (HOW), and Senior Options were low-income or at the poverty level.
- HOW serves individuals living with Alzheimer's disease and other dementias as well as their caregivers. A 2019 "Community Health Needs Assessment" by NorthShore University HealthSystem identified Alzheimer's disease/dementia as a priority health need, and older adults were identified as a population of focus. According to the Alzheimer's Association, 11% of people 65 and older in the U.S. have dementia. In Illinois, the prevalence of Alzheimer's disease and other dementias is projected to increase in those 65 and older by 13% between 2020-2025. This disease has wide-ranging impacts on both the people living with the condition and those who care for them.
- Volunteers provided almost 8,000 hours of service across the organization at a value of \$227,150. Volunteers have untapped strengths and talents, and they are willing to commit more time to NSSC to improve its programs, outreach, and participation.
- NSSC has more than 145 community partners and resources including townships and chambers, accrediting organizations, hospitals, fire and police departments, places of worship, senior housing buildings, community groups, libraries, political figures, pharmacies, and corporate partners.

## A Bold Vision for the Future

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North Shore Senior Center has built its success on high-quality services and programs, operating for over 65 years as it serves communities in Chicago's northern suburbs. In addition to multiple locations and spaces in the community, it operates out of a building that is designed specifically for its purpose and attracts older adults from a wide area. The Center is a place where people find a community of peers, and support and information from well-qualified, caring professionals. People choose to come to NSSC over other senior centers, libraries, or other community organizations because of the full experience where they can engage with peers, enjoy informal social spaces, learn in comfortable surroundings, find information and support, access many other services, and feel welcome and safe.

**A bold vision for the future leverages our previous successes and lessons learned while anticipating emerging trends to become a “one-stop” organization with many access points and multiple locations throughout our community.** We encourage our participants, members, caregivers, and families to “come as they are” and be connected to the best programs and services for aging well and thriving in the community. We will work toward bringing families and communities together through innovative programming with an emphasis on intergenerational, age-integrated, and inter-connected programs and services that will provide ways for us to come together as a community. Our work will maximize experiences and knowledge across generations as all generations have something to give and receive.

**Our engaged, committed, and diverse workforce will touch people where they are** – in their homes, in hospitals, skilled nursing facilities, and community spaces. NSSC has provided these talented and dedicated professionals with the tools, resources, and flexibility to provide greater access for participants and members, while enhancing the employment experience.

**NSSC is committed to being the place to build relationships and will look to highlight social connectedness** in terms of community partnerships, development of innovative programs and services, and physical space. We will plan on the evolution of our current main campus as we strive to upgrade the building and its outdoor space, fitness center, and meeting rooms; enhance technology; explore partnerships with restaurants, health and wellness organizations, counseling services, and other medical partners; and host more community services and programs for older adults, their families, and caregivers.

**In this plan, NSSC is viewed as a place without walls – a vibrant, inclusive community where individuals feel a sense of belonging, connection, and care.** We serve people born over 5 decades, which creates challenges – and opportunities – in meeting diverse needs. Our stakeholders affirmed that diverse and innovative programming needs to be a priority. Our organization and our community will be stronger and more effective to the extent we build mutually beneficial relationships with community partners who represent diverse voices and perspectives in the community. We look forward to garnering support for this critical work from individuals, foundations, companies, governments, and other organizations.

## Strategic Directions

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Looking to the future, the Strategic Planning Committee discussed national trends; assessed internal and external threats and opportunities; evaluated the current strengths of the organization; and listened to the voices of its stakeholders. From these varying perspectives, three strategic directions emerged: Talent, Technology, and Telling the Story. Weaving through each of these is a focus on Diversity, Equity & Inclusion (DE&I).



### NSSC will:

1. Invest in its organizational talent so, as an organization, it is nimble, responsive, and able to meet future community needs. The organization will create and maintain a culture of continuous learning, curiosity, and service for its employees, board members, and volunteers.
2. Assess and evaluate current technology resources and identify critical future needs that reflect strategic and financial stewardship and effective delivery of programs and services.
3. Function as a thought leader convening internal and external conversations and activities related to aging and aging services.
4. Develop a sustainable business model that increases revenues and promotes efficiency.

# Talent

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**NSSC will invest in its organizational talent so, as an organization, it is nimble, responsive, and able to meet future community needs. The organization will create and maintain a culture of continuous learning, curiosity, and service for its employees, board members, and volunteers.**

- Foster an organizational culture that reflects the values of NSSC as they relate to work environment, compensation, benefits, and recognition
- Provide ongoing professional and educational development activities to deepen the knowledge, skills, and competencies of staff, board, and volunteers
- Design and execute a recruitment and selection process for the Board of Directors that ensures a comprehensive pool of skills, resources, and connections that best serves the mission, vision, and values of NSSC
- Continue the Board of Director's commitment to develop a clear description of board roles, responsibilities/expectations, and board/staff committees
- Review and update by-laws as well as board policies and procedures that will advance the identified strategic directions
- Establish a succession planning strategy for board and staff providing clarity and capacity for leadership transitions
- Promote excellence in communication throughout the organization
- Advance strategic objectives through the lens of Diversity, Equity, and Inclusion (DE&I) – both internally and externally
- Ensure proper fiduciary responsibility and stewardship of resources through intentional and effective resource allocation

**Goal #1: Invest in employees through effective, inclusive, and equitable workplace policies and practices.**

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<p><b>Develop a competitive employment package</b></p> <ul style="list-style-type: none"> <li>• Wages</li> <li>• Benefits</li> <li>• Professional development</li> <li>• Career advancement</li> <li>• Workplace policies</li> <li>• Reward and Recognition</li> <li>• Tools, resources, and processes</li> </ul>	<p><b>Year 1 – Securing the Future</b></p>	<p>Audit existing HR policies and practices (checklist with status of each policy/practice and action steps)</p> <p>_____</p> <p>Research best practices</p> <p>_____</p> <p>Identify most significant gaps</p> <p>_____</p> <p>Allocate resources based on gaps</p>	<p>Complete audit by 3/31/23</p> <p>_____</p> <p>Update competitive pay package by 4/30/23 using internal and external wage information</p> <p>_____</p> <p>Identify future resource allocation needs by 5/31/23</p> <p>_____</p> <p>Allocate funds in FY23 budget for 5% salary increases and, based on revenue, potential additional bonuses</p> <p>_____</p> <p>Funds required for FY24 budget will be identified during next budget cycle</p>
<p><b>Focus on recruitment and retention efforts</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Identify hard-to-fill positions and critical hires for next 12 months and optimize competitive employment package for those positions</p> <p>_____</p> <p>Analyze all positions based on strategic and organizational objectives – identify opportunities for cross-skilling, additional training, career advancement, etc.</p>	<p>Leadership Team will develop a recruitment/retention strategy by 11/30/22</p> <p>_____</p> <p>Workforce planning analysis is completed by 5/31/23</p> <p>_____</p> <p>Budget neutral for action steps</p> <p>_____</p> <p>Funds required for FY 24 budget will be identified during next budget cycle</p>

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<p><b>Promote continuous and transparent communication within the organization</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Build on activities in “Telling the Story” (Strategic Direction #3)</p> <p>Messaging includes:</p> <ul style="list-style-type: none"> <li>• One organization; many doors</li> <li>• Every employee, board member, and volunteer are critical to the care of those we serve</li> <li>• Depth and breadth of our programs and services gives us a competitive advantage</li> <li>• Colleagues, partners, and stakeholders recognize expertise</li> </ul> <hr/> <p>Leadership Team and managers will initiate outreach to all employees through one-on-one conversations</p> <hr/> <p>Leadership Team will identify opportunities to use scheduled meetings to build community and learning</p>	<p>Create guide for “Telling the Story” to incorporate the Reframing Aging concepts, NSSC’s competitive advantage, and thought leadership in the field by 11/30/22</p> <hr/> <p>Learning session(s) for “Telling the Story” for employees conducted by 01/31/23</p> <hr/> <p>Employees will share information and be brand ambassadors for NSSC</p> <hr/> <p>Employee conversations completed by 6/30/23</p> <hr/> <p>Leadership Team will create communication opportunities: share highlights of its meetings; use current meeting agendas to focus on clear communication; and identify opportunities for organizational learning —ongoing</p> <hr/> <p>Budget neutral</p>

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<b>Explore Core Values and link to “one” organization</b>	<b>Year 2</b> – Designing for Future Needs	Hardwire Core Values into all organizational processes and practices	
<b>Emphasize NSSC as “employer of choice” incorporating changes in competitive employment package, professional development, career advancement, etc.</b>	<b>Year 2</b> – Designing for Future Needs	Update Employee Handbook based on Year 1 findings and activities	
<b>Update/revise performance management tool with emphasis on Core Values, continuous learning, and future participant needs</b>	<b>Year 2</b> – Designing for Future Needs	Review current PM tool _____ Revise PM tool based on Year 1 activities with focus on both the activities as well as the behaviors	Review of tool completed by 8/31/23 _____ New PM tool is developed and rolled out to all employees by 3/31/24 for use in evaluation cycle starting 7/01/24
<b>Focus on succession planning, future skill requirements, and career advancement</b>	<b>Year 3</b> – Enabling Innovation and Transformation	Build comprehensive supervisor/manager/leader curriculum	



**Goal #2: Support and strengthen the board so that its members are informed and engaged in advancing the mission of NSSC and its strategic directions. Ensure that board members feel their time and talent is used effectively and appropriately. Build pipeline of board candidates that reflects the communities served by NSSC.**

Objectives	Phase	Action/Implementation	Evaluation Criteria/Financial Implications
<p><b>Complete ongoing board governance work (board member matrix that identifies gaps in skills, expertise, and experiences; board recruitment and selection process; and compelling message for NSSC board service)</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Develop job profile for board members</p> <p>_____</p> <p>Use matrix to identify and interview potential board candidates</p>	<p>Board Profile completed by 12/31/22</p> <p>_____</p> <p>Board recruitment process is based on matrix evaluation starting 11/30/22—ongoing</p> <p>_____</p> <p>Budget neutral</p>
<p><b>Current and future board members are fully oriented to board service at NSSC</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Design an orientation for all board members on the strategic plan, their fundraising opportunities, roles, responsibilities, and expectations; opportunities to participate; breadth of programming and services</p> <p>_____</p> <p>Re-orient current board members; use new orientation for future board members</p>	<p>Orientation program designed by 3/31/23</p> <p>_____</p> <p>Current board members re-oriented by 6/30/23; New board members oriented within 60 days of joining board</p> <p>_____</p> <p>Budget neutral</p>

Objectives	Phase	Action/Implementation	Evaluation Criteria/Financial Implications
<b>Promote continuous and transparent communication within the organization</b>	<b>Year 1 – Securing the Future</b>	Build on activities in “Telling the Story” (Strategic Direction #3) <ul style="list-style-type: none"> <li>• One organization; many doors</li> <li>• Every board member, employee, and volunteer are critical to the care of those we serve</li> <li>• Depth and breadth of our programs and services gives us a competitive advantage</li> <li>• Colleagues, partners, and stakeholders recognize expertise</li> </ul>	Create guide for “Telling the Story” to incorporate Reframing Aging concepts, NSSC’s competitive advantage, and thought leadership in the field by 11/30/22 _____ Conduct learning session for board before 3/31/23 _____ Board members can share information and be brand ambassadors for NSSC _____ <b>Budget neutral</b>
<b>Focus on visionary board leadership development</b>	<b>Year 2 – Designing for Future Needs</b>	Identify leadership training opportunities for board members (and staff) that will advance strategic directions	
<b>Update all board policies and practices</b>	<b>Year 2 – Designing for Future Needs</b>	Review and revise by-laws to reflect governance best practices and future opportunities	
<b>Utilize a board assessment tool</b>	<b>Year 2 – Designing for Future Needs</b>	Develop board scorecard based on measures related to board engagement, fiscal stewardship, strategic focus, etc.	
<b>Create a process for board members to identify their engagement with and contributions to NSSC</b>	<b>Year 2 – Designing for Future Needs</b>	Draft and execute a survey/self-assessment for all board members _____ Create individual board engagement plan _____	

Objectives	Phase	Action/Implementation	Evaluation Criteria/Financial Implications
<b>Create a process for board members to identify their engagement with and contributions to NSSC (continued)</b>	<b>Year 2 –</b> Designing for Future Needs	Set meeting with each board member and board chair on an annual basis	
<b>Explore Core Values as part of board’s discussion regarding board culture and governance</b>	<b>Year 3 –</b> Enabling Innovation and Transformation	Culture of Philanthropy _____ Culture of Curiosity _____ Culture of Foresight	

**Goal #3: Leverage the talents and experiences of volunteers to support the mission of NSSC. Create a culture of volunteerism and service. Expand volunteers to represent communities served.**

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<p><b>Raise visibility and recognition of NSSC’s volunteers and volunteerism in general</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Review volunteer survey feedback and recommend improvements for the volunteer experience</p> <p>_____</p> <p>Volunteer celebration event</p> <p>_____</p> <p>Host Super Senior event (partnership with other community organizations)</p>	<p>Review volunteer feedback by 12/31/22; prioritize improvements for the volunteer experience beginning 4/1/23</p> <p>_____</p> <p>Conduct volunteer event by 11/25/22</p> <p>_____</p> <p>Host event by 3/30/23</p> <p>_____</p> <p>Funding for events allocated in FY23 budget</p>

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<b>Promote continuous and transparent communication within the organization</b>	<b>Year 1 – Securing the Future</b>	Build on activities in “Telling the Story” (Strategic Direction #3) <ul style="list-style-type: none"> <li>• One organization; many doors</li> <li>• Every employee, board member, and volunteer are critical to the care of those we serve</li> <li>• Depth and breadth of our programs and services gives us a competitive advantage</li> <li>• Colleagues, partners, and stakeholders recognize expertise</li> </ul>	Create guide for “Telling the Story” to incorporate Reframing Aging concepts, NSSC’s competitive advantage, and thought leadership in the field by 11/30/22 _____ Learning sessions for volunteers conducted before 3/31/23 _____ Volunteers share information and are brand ambassadors for NSSC _____ <b>Budget neutral</b>
<b>Expand programs/services through use of volunteers</b>	<b>Year 1 – Securing the Future</b>	Re-institute volunteer-based transportation initiative	Design and execute pilot program using new software by 12/31/22 _____ <b>Funding is in FY 23 budget</b>
<b>Engage and empower volunteers</b>	<b>Year 2 – Designing for Future Needs</b>	Create a volunteer manual _____ Evaluate additional volunteer opportunities based on strategic plan	
<b>Explore and execute a corporate partnership/ intergenerational volunteer opportunity/program</b>	<b>Year 2 – Designing for Future Needs</b>	May wish to create “tiger team” to develop program/solicit corporate sponsorship and participation	

# Technology

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**NSSC will assess and evaluate current technology resources and identify critical future needs that reflect strategic and financial stewardship and effective delivery of programs and services.**

- Determine current inventory and assets for short-term and long-term planning purposes
- Identify training gaps and resources for ongoing training needs
- Ensure the creation of an overall plan for using technology that is financially sustainable and achieves organizational objectives
- Identify partnerships and relationships who connect with our mission to serve older adults
- Advance strategic objectives through the lens of Diversity, Equity, and Inclusion (DE&I) – both internally and externally
- Ensure proper fiduciary responsibility and stewardship of resources through intentional and effective resource allocation

**Goal #1: Evaluate current technology resources and provide appropriate training on current resources.**

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<b>Complete technology inventory (software/hardware)</b>	<b>Year 1 – Securing the Future</b>	Additions: IT staff person on-site; AV Assistant _____ Identify most significant gaps _____ Allocate resources based on gaps	GCS will provide on-site support staff by 10/01/22 _____ Leadership Team will continue to meet monthly with tech expert _____ Inventory will be completed by 12/31/22 _____ Funds for staffing and some initial technology purchases allocated in FY23 budget
<b>Evaluate training needs and create training plan for existing resources</b>	<b>Year 1 – Securing the Future</b>	Identify needs of current employees _____ Develop training plan for new employees	Training plan completed by 3/31/23
<b>Identify additional technology resources</b>	<b>Year 1 – Securing the Future</b>	Explore in-kind donations from organizations that are closing their offices	ED & Board Member will make contact with 3 companies to assess possible donations by 11/30/22
<b>Develop decision-making matrix related to technology decisions</b>	<b>Year 1 – Securing the Future</b>	Identify criteria for future decisions related to current or future technology. Criteria will guide decision making, resource development, and allocation of current resources	Leadership Team will meet with technology resources and develop decision-making matrix by 12/31/22
<b>Anticipate and plan for future technology needs</b>	<b>Year 2 – Designing for Future Needs</b>	Using priorities identified in matrix, begin to update equipment that affects programming, member experiences, and NSSC brand/reputation	

**Goal #2: Develop a long-term technology strategy that reflects future technology needs.**

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<p><b>Develop a business plan that identifies priority initiatives, areas of focus, and long-term investments based on needs of stakeholders</b></p>	<p><b>Year 1</b> – Securing the Future  <b>Year 2</b> – Designing for Future Needs</p>	<p>Leverage volunteer expertise and utilize vendor experience (e.g., “Geek Squad”)</p>	<p>Business plan developed by 06/30/23 _____ FY23 – budget neutral _____ FY24 TBD</p>
<p><b>Explore funding opportunities for future technology needs</b></p>	<p><b>Year 2</b> – Designing for Future Needs</p>	<p>Create a specific resource development plan for technology funding</p>	
<p><b>Identify opportunities for technology pilot programs</b></p>	<p><b>Year 2</b> – Designing for Future Needs</p>	<p>Design a “pilot” technology program that focuses on accessibility and inclusion</p>	



## Telling the Story

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**NSSC will function as a thought leader convening internal and external conversations and activities related to aging and aging services.**

- Use internal and external messaging to change the conversation about aging and aging services
- Actively collaborate with other aging organizations, community partners, and stakeholders
- Ensure that Reframing Aging concepts are integrated into programs, marketing, and other communications
- Continue to build a “new” brand – creating community for all; comprehensive community strategy; age well with us
- Identify areas of immediate strategic growth and market these programs/services
- Advance strategic objectives through the lens of Diversity, Equity, and Inclusion (DE&I) – both internally and externally
- Ensure proper fiduciary responsibility and stewardship of resources through intentional and effective resource allocation

**Goal #1: NSSC will use the national “Reframing Aging” conversation to help build a better understanding of aging, ageism, and what it will take to become a more age-integrated community.**

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<p><b>Use intentional language consistently throughout the organization</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Conduct audit and assessment of current messaging and communications using the Reframing Aging guidelines and other resources</p> <p>_____</p> <p>Continue to build the website and other communication channels using these intentional practices</p>	<p>Audit and assessment completed by 2/28/23</p> <p>_____</p> <p>Website is updated on a regular basis</p> <p>_____</p> <p>Budget neutral</p>
<p><b>Ensure that NSSC’s staff, board members, and volunteers understand the philosophy and concepts behind the Reframing Aging framework</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Identify workshops, webinars, and other educational opportunities to introduce “Reframing Aging” to the staff, board, and volunteers</p> <p>_____</p> <p>Create a simple internal guide that the board and staff can reference to ensure they are sharing consistent messages regarding aging and ageism</p>	<p>Leadership Team to participate in a workshop by 12/15/22; Incorporate learning opportunities for staff in 2022-2023 staff activities; Board to participate in a workshop by 5/31/23</p> <p>_____</p> <p>Marketing &amp; Communications to create a guide by 1/31/23</p> <p>_____</p> <p>Budget neutral</p>
<p><b>Build NSSC’s and the community’s thought leader expertise on age-integrated opportunities</b></p>	<p><b>Year 2 – Designing for Future Needs</b></p>	<p>Schedule community workshops to explore and gather thought-leader expertise on future age-integrated programs and services</p>	

**Goal #2: Incorporate age-integrated core principles and fundamental concepts into program planning, marketing, and communications with funders and donors.**

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
<p><b>Ensure accurate and transparent reporting and communications with funders, donors, and key community leaders</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>As feasible, incorporate Reframing Aging elements into communications with key funders, donors, and community leaders</p>	<p>Messaging and communication templates reflect “Reframing Aging” elements by 5/31/23</p> <p>_____</p> <p>Budget Neutral</p>
<p><b>Develop marketing and communications materials for older adults, care partners, and families within our service area that address age-related issues</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Develop special publications that specifically address age-related concerns/issues</p> <p>_____</p> <p>Incorporate Reframing Aging language into website and all marketing materials</p> <p>_____</p> <p>Identify programs/services with most immediate growth potential; create marketing plan for these programs/services</p>	<p>Ongoing—materials developed by 06/30/23</p> <p>_____</p> <p>Ongoing</p> <p>_____</p> <p>Assessment of opportunities by 1/31/23 Marketing plan developed by 3/31/23</p> <p>_____</p> <p>Budget neutral</p>
<p><b>Evaluate effectiveness of brand and identity changes over last 3 years</b></p>	<p><b>Year 1 – Securing the Future</b></p>	<p>Assess brand effectiveness and create “needs” list</p>	<p>Ongoing/completed by 5/01/23</p> <p>_____</p> <p>Budget neutral</p>
<p><b>Promote the benefits of intergenerational involvement in programs and services</b></p>	<p><b>Year 2 – Designing for the Future</b></p>		

Objectives	Phase	Action Plan/Implementation	Evaluation Criteria/Financial Implications
Develop proposal for revised brand and identity. Identify sources of funding	Year 2 – Designing for the Future		
Complete review of all NSSC services, events, etc. to determine if and how Reframing Aging concepts can be incorporated into programs’ design and execution	Year 2 – Designing for the Future  Year 3 – Enabling Innovation and Transformation		