

Dupont Circle Village Strategic Plan: 2014-2016 February, 2014

Five years after its founding, the Dupont Circle Village Board of Directors, the chair of the Membership Committee and Volunteer Program Coordinator met on January 11, 2014 for a second retreat. The purpose was to examine the state of the Village: achievements, missteps, omissions and, most important, to define the needs and future goals of the organization.

The new Strategic Plan identifies four areas considered essential to the Village's continued growth and effectiveness: **Financial Sustainability; Operational Structure, Programs and Membership.** The document sets goals and target dates for implementation in each of these areas.

I: Financial Sustainability

GOAL: To achieve a level of financial stability through a predictable income flow from multiple sources that will provide funding to increase staffing, undertake new initiatives and create a fund to subsidize lower income memberships.

RATIONALE: Without a sound financial structure DCV can neither grow nor accomplish the goals we set for ourselves. This requires strengthening our donor base and building a permanent group of donors who will support us on a continuing basis in addition to membership dues.

STRENGTHS TO MAINTAIN

- Achieving a balanced budget each year
- Fundraising activities like the Silent Auction and Celeb Salons
- Multiple income streams, i.e. dues, contributions, grants
- Establishment of a Reserve Fund
- Establishment of a Subsidized Membership Fund

Initiatives for 2014

Expanding Our Donor Base

- Promote IRA Beneficiary Gifts
 - a. Create a small advisory committee or individuals to provide advice and assistance as needed
- Build Donor List to include relatives and friends of members we have helped
- Strengthen List of Recurring Donors
 - a. Develop list of non-members/volunteer donors who have contributed \$100 or more for purposes of one-on-one interviews: why do they give, what's the Village attraction to them, special connection)
- Invite Donors to Events (existing programs or specially planned donor events)

Professional Fundraiser

- Consultation(s) with a professional fundraiser (pro bono or discounted) would assist us in creating programs to advance our goals and acquaint us with fundraising tools

Financial Impact of Programs

- Existing and proposed programs or projects should be assessed for their compatibility with the framework of the 2014-2016 Strategic Plan.
- A Parking Lot List for ideas should be established for ideas deemed impossible to implement within the framework of the strategic plan at the time suggested. The list should be reviewed quarterly.

Initiatives for 2015-2016

Expand and Promote Planned Giving Programs

- Emphasize gifts to DCV in wills
- Benefits of giving before death
- Consider matching fund approach to gifts
- Specify what donations specifically have already accomplished
- Publicize and promote with leaflets, newsletter articles, repeated reminders about how to give
- Evaluate Programs to Determine Effectiveness

II Operational Structure

GOAL: The Village will work to further develop systems that efficiently and effectively set goals and priorities that allow the organization to respond to the needs of a growing membership utilizing the talents of volunteers, board members and paid staff.

RATIONALE: A strong operational structure enables the Village to maintain visionary and operational leadership and be a recognized leader in the field of “aging in place” organizations.

STRENGTHS TO MAINTAIN

- Partnership for leadership with Board President and Executive Director who meet weekly
- Paid position of Executive Director
- The role of Volunteer Coordinator
- A Board that meets regularly, maintains careful records and is aware of the scope of policy, fiduciary and visionary responsibilities
- Active participation in the Village-to-Village national and local networks and annual conferences
- An office that allows for coordination of efforts, a place to house materials and a location for meetings
- A bi-annual Board Retreat to evaluate leadership structure, given the growing nature of the Village

- An office that allows for coordination of efforts, a place to house materials and a location for meetings
- The Membership Committee that meets weekly at the office with regularly defined tasks for gaining and maintaining membership in coordination with the ED and the Board Treasurer

Initiatives for 2014

- Create a budget that allows an Executive Director to work full-time as soon as possible to accomplish the priorities that the board has set and scope of need for our larger membership
- Develop ways to engage volunteers to take on aspects of the day-to-day Village needs, including but not limited to member and inquiry calls and making up of packets, that will free up the Executive Director to work on priorities established by the Board
- Recognizing the importance of technology, get set up on Club Express as soon as possible and no later than June 2014
- Update the Board Handbook to create and maintain clarity about board structure, expectations, responsibilities and selection and training of board members
- Identify an individual within the membership who would lead the effort, in coordination with the Executive Director, to engage volunteers in the daily operation of the Village
- Create a plan immediately to identify the range of member interests, willingness and expertise of the Village
- Identify a list of volunteer opportunities and make them known to the membership in appealing ways
- Create a committee that defines, systematizes and implements a plan for meeting the increasing social/emotional needs of members under the direction of the Executive Director
- Examine and clarify the role, structure and expectations of all Village Committees, including creating new ones as needed (with the assent of the Board, as required by DCV Bylaws)

Initiatives for 2015-2016

- Full-time Executive Director
- Hire additional staff: for example, Social Worker, Health Care Specialist, Office Manager
- Reconstitute the Advisory Committee including defining its purpose, goals and membership
- Create succession plan for Village leadership including, but not limited to, the Board, and the Executive Director
- Examine and clarify the role, structure and expectations of all Village committees

III Program Development

GOAL: To implement programs that will stimulate member growth and benefit the Dupont Circle/Kalorama/Adams Morgan Community through development in four major areas:

1. Promoting mind body health and prevention; supporting the health care needs of members and the community
2. Supporting interest in and engage members in the arts
3. Feeding the Village: good nutrition and the joy of food
4. Educating members on the economics of aging and provide access to information and assistance to assure financial security

STRENGTHS TO MAINTAIN:

- Educational monthly program: Live & Learn
- Health and Wellness Programs: Matter of Balance
- Fitness Programs: Walking groups, Yoga
- Social and Cultural Programs: Soup Salons, group meals, museum tours, potluck dinners, theater outings
- Volunteer Services: transportation, errands, meals, technology, companionship

Initiatives for 2014

Promoting Mind Body Health and Preventions:

- Create Tai Chi, Meditation or Alexander Technique (improving and sustaining good posture at any age) program
- Create a volunteer “Social Services” subcommittee to interact with members who have questions and need assistance, information, support or referrals to health care related resources in the DC community. Training, developed by the Executive Director and an “outside expert” would be offered to committee members. The Executive Director and the Health and Wellness Committee will have oversight responsibilities for the work of the subcommittee

Initiatives for 2015-2016

Goals will be set by the committee

The Art of Living: Engaging Members in The Arts

- Form a committee of members who can create goals for the program area and outline activities for the next 2-3 years
- Form affinity groups of individuals interested in specific areas of the arts (opera, jazz, museums)

Good Nutrition and the Joy of Food: Feeding the Village Community

- Create a new program area focused on food and nutrition and identify members who would like to make up a committee. Committee members would set goals, identify areas for focus and lay out activities for the next 2-3 years.
- Explore organizational relationships with groups such as “Food and Friends” to advance our nutritional agenda and provide additional resources

Educating Members on the Economics of A Secure Retirement and Providing Access to Economic and Financial Information and Assistance

Initiatives for 2014

- The leadership for this program area falls under the purview of the Live and Learn Committee.
- The Strategic Plan Program Committee recommends review of current and past programming and development of 1-3 year goals and list of activities.