

# EAST FALLS VILLAGE STRATEGIC PLAN

STRATEGIC PLANNING COMMITTEE

May , 2014



[CLAconnect.com](http://CLAconnect.com)



# Strategic Planning Process



# Mission

## Mission

*To enhance the lives of residents in the East Falls neighborhood of Philadelphia as they grow older.*

# Revised Vision

## Investing in Our Future

*We will work together to build a sustainable and supportive community by providing support, services, social and educational programs, planning and information to enable East Falls' residents to live healthy and meaningful lives in their own homes as they age.*



# SWOT Analysis

# Strengths of EFV (updated)

- Strong leadership
- Affordable dues
- Strong volunteer corps
- Member engagement
  - Crucial to sustaining the organization; brings forth volunteers
  - What kind of involvement will enhance members' lives?
- Partnership with East Falls Community Council
- Self-sufficient (self-sustaining) organization
- *The Fallser* – (for outreach)
- Operates in a cohesive, well-defined neighborhood
- Village-to-Village network – (for support and assistance)

# Weaknesses or Areas for Improvement

- Underdeveloped marketing and communications strategy for getting new members, retaining members, advertising EFV services to the membership, and engaging the larger East Falls community”
- Need for clearer identity
- Challenges of an all-volunteer organization
- Dues structure perceived to be beyond the reach of some
- Inconsistency in describing and positioning EFV
- Lack of physical focus point for volunteers (office)

# Opportunities

- Strengthen marketing, communications
- Develop strategic partnerships with community institutions, organizations and businesses (student volunteers, service options, publicize EFV, etc.)
- Recruit community or “opinion” leaders as members
- Engage people who feel they ‘don’t need EFV yet’
- Link with other area/regional Villages to create network
- Encourage members to be more actively engaged
- Expand and diversify social, recreational and educational programs
- Increase website use by members – Club Express platform
- Examine providing direct access to vendors
- Expand representation from all East Falls neighborhoods



# Threats

- Lack of plan for replacing of leaders, volunteers, i.e. burnout among active volunteers (succession plan)
- Lack of funding



# Small Group Discussions

Portrait of East Falls Village's Future



[CLAAconnect.com](http://CLAAconnect.com)

## Topic #1

- **Services:** What services do we want to provide in the future? Are we effectively helping our neighbors age in place? Do we want to expand what we offer? If so, what additional services do we think that people want and or need? Do we want to sell any services?

## Group Summary

- No one was interested in selling services to increase revenue. There was interest in continuing to offer student help for things like snow removal where the member pays the student directly.
- Use the website to post volunteer opportunities and to list vendor categories for referrals. Make sure that volunteers are aware of what services EFV provides and members are regularly reminded; and that members help update the vendor list and are prompted to evaluate service received
- Consider adding the following programs/services: daily phone checks; group dining; accompany someone to doctor (serve as note taker or advocate); on-call nurse practitioner; grocery shopping and/or order on line.

## Group Summary

- Enhance vetted vendor list to include ‘aging in place’ services.
- Support local events, i.e. beef and beer; sporting events; etc.
- EFV needs to recruit a volunteer who specializes in health care related referrals. We should be good at understanding the categories of health care related services, who pays for them, how they are accessed and for what they are used.
- Expand social activities/programming by developing small interest groups, e.g. music, bridge, walking, book groups, yoga.
- Have bulletin board on web site for members to post their interests and make connections among members.
- Find ways to actively ‘push’ members to use bulletin board and encourage member postings on weekly Update, e.g. in margins or at bottom of page.
- Open activities and programs to non-members at an increased fee.

## Topic #2

- **Organizational Structure:** Do we believe we should remain an East Falls only organization? Do we think there would be advantages (or disadvantages) to joining with other Villages? What are those advantages and disadvantages? With what Villages could we partner? How would that partnership work? What benefits and challenges might EFV enjoy/experience from partnering with other Villages?

## Group Summary

- Remain focused on East Falls, including nearby portions of immediately adjacent neighborhoods; remain connected to the East Falls Community Council.
- Build partnerships with other organizations to expand and diversify program and service offerings. Believe more formal relationships/partnerships with local institutions are critical to EFV's future and will benefit members, e.g. student volunteers and paid workers (snow shoveling); My Way for services; university student internships.
- Open to collaborating with other area Villages (Penn's Village, Mutual Mt. Airy) without sacrificing independence and losing focus on East Falls, e.g. preferred pricing from vendors, shared staff, etc.

## Topic #3

- **The Role of Volunteers**: Should EFV remain a volunteer driven organization? If yes, what needs to be done in order to sustain and grow the operation, keeping in mind previous discussions regarding services, etc. If paid staff are needed, what would paid staff be responsible to do, and what would volunteers be responsible to do? What impact does moving away from an all volunteer model have on the organization in the future? What financial model needs to be in place in order to successfully manage the increased budget?



## Group Summary

- EFV should remain volunteer driven as it gives a sense of ownership and community.
- Should explore ways to bring on paid staff. Concerns about being able to afford paid staff, and whether part-time staff can focus enough to accomplish what needs to get done.
- Paid staff could manage volunteers and vetted vendors, publicity/promotion, daily administration, fundraising.
- Need a strategy to avoid volunteer burnout.
- Need to recognize volunteers and their good work. Provide a forum for people who have retired to keep up to date on their interests, e.g. law, medicine, management

## Topic #4

- **Financial Model:** Should we maintain our current dues structure? What dues structure do we need to need to have to support the ideas shared earlier regarding services? What impact (negative and positive) will increasing dues have for the organization? What role does fundraising play in the future of East Falls Village?

## Group Summary

- Consider fundraising, e.g. grants, special events, website ads, campaign to sponsor members.

# Strategic Directions

The term “Strategic Directions” is used to identify, in general terms, the directions or paths that East Falls Village will choose to pursue in the foreseeable future. The Strategic Directions serve as the foundation for the Strategic Plan.

- ***Continue To Build on Programmatic Strengths*** – EFV has successfully grown into a vibrant community-based program for older residents of East Falls. Known predominately for its robust social and educational programming, EFV will focus the next five years on expanding its other programs and services while not losing sight of the importance of current programming. The goal of this strategic direction will be to become an even more important part of the fabric of the East Falls community, particularly for those aging at home, by actively reaching out to people who need assistance, including those who need it on a temporary basis.
- ***Take Steps to Ensure a Viable, Robust Future*** – EFV has been an independent, volunteer driven organization since its inception. The organization wants to remain volunteer driven, yet understands that paid staff will be critical to manage the areas of focus necessary to ensure a viable, robust future for the Village: membership growth; expansion of programs and services; improved Village funding; and increased volunteer opportunities (with succession planning for current leadership).

# Initiatives

‘Initiatives’ are defined as those actions or major steps that will be taken by East Falls Village in order to advance or achieve the associated Strategic Direction. The Initiatives are intended to be accomplished (or substantially implemented) over an approximate 3 to 5 year period, but with immediate focus. It is anticipated that an ongoing Strategic Planning process for EFV will result in revisions to the Initiatives and especially new or expanded Initiatives – given that the Strategic Directions, by design, will require a longer period to achieve.

## ***Continue To Build on Programmatic Strengths*** ***Initiatives***

1. Explore the possibility of adding the following programs/services:
  - daily phone checks;
  - Group dining;
  - accompany member to doctor (serve as note taker or advocate);
  - on-call nurse practitioner and/or case assessment specialist
  - small group social activities (poker, book club, etc.); and
  - grocery shopping and/or order on line.
2. Further develop the website to make it more user friendly and to increase member access to services, to each other (bulletin board and chat rooms) and to volunteer opportunities. Promote it actively.
3. Manage the vendor list, including vetting all vendors interested in participating and expanding the list to include additional services to support those members who are aging at home. Explore the possibility of preferred pricing and ways to provide members with immediate access to vendors (up to date list on member's only website).
4. Recruit a volunteer 'health care' specialist who can help to educate EFV volunteer leadership and members on topics of concern related to aging in place.
5. Explore the possibility of closer relationships with local organizations with complementary missions, e.g. My Way.
6. Expand communications and advertising frequency related to programs and services including links to sign up, etc.

## ***Take Steps to Ensure a Viable, Robust Future –Membership Growth***

### **Initiatives**

1. Explore additional activities and programs to non-members to expose them to EFV.
2. Develop an ‘elevator speech’ to improve understanding of EFV among members and prospective members and to improve the way volunteers talk about EFV.
3. Explore advertising opportunities to reach new members (e.g. St Bridget’s bulletin, Fallser, bike race, flea market)
4. Organize informal open houses and meetings in people’s homes, also gatherings at churches, restaurants, and bars to recruit members and volunteers.
5. Increase member engagement to increase likelihood of member renewal
6. Have a regular member/guest event—extend guest invitations to most events

## *Take Steps to Ensure a Viable, Robust Future –Volunteers*

### *Initiatives*

1. Develop a succession plan for every volunteer position. Develop job descriptions of all volunteer positions. For every leadership position there is a vice chair. Post on the website. Offer job sharing opportunities for positions.
2. Explore possible incentives to encourage members and non-members to volunteer
3. Expand member and non-member volunteer recognition program



## ***Take Steps to Ensure a Viable, Robust Future – Increase Funding***

### **Initiatives**

1. Explore possible opportunities for grant funding.
2. Explore having an annual fundraising event.
3. Explore selling ads on the EFV web site and as part of all publications, membership meetings, etc.
4. Explore a campaign for sponsorship of lower income members.
5. Explore a plan to increase or not increase dues annually.
6. Explore a plan to develop sponsorship/partnership arrangements

## ***Take Steps to Ensure a Viable, Robust Future – Explore Paid Staffing***

### **Initiatives**

1. Develop job descriptions for a paid EFV Manager – full-time and part-time.
2. Explore all possibilities for adding a paid staff person, including working with other community organizations to ‘job share’ and government/foundation/private support.
3. Explore possible partnership opportunities with Penn Village or Mutual Mt. Airy related to paid staff (and any other ways to work together to save on expenses and increase organizational strength while maintaining EFV independence).
4. Develop stronger relationships with the leadership of Philadelphia University, Penn Charter and other local institutions to ensure regular access to interns, space, etc.

# Strategic Plan Implementation: Programs, Services, and Village Infrastructure



[CLAconnect.com](http://CLAconnect.com)



# Maintain and Enhance Programming

- Social-cultural programs and events
- Active Learning/Educational programs and events
- Health/Wellness programs and events

## Provide Services for Members

- Single point of contact for information about programs, events, services, referrals, aging-related issues
- Healthcare-related advocacy, education, information and referrals to provider network regarding case assessment and how-to-navigate-the-system issues
- Friendly contacts with members requesting regular “check-in’s”
- Initial visits to new members to determine needs and explore volunteer opportunities
- Periodic contacts with current members to determine needs and explore volunteer opportunities

## Provide Services for Members (continued)

- Transportation
- Simple handy-man services
- Vendor referral list, easily accessible by password to EFV website
- Engagement with other community organizations on shared objectives and opportunities, e.g. safety and security, community facilities and services, fairs, etc.
- Computer, cellphone, website availability, and related technology support

## Provide Infrastructure to Support Programs and Services

- Leadership and planning
- Budgeting, finance, & development
- Communication, advertising, and promotion activities
- Website and database for information and administration
- Administrative and technical support (volunteer wherever possible; paid where necessary)

# Developed by: Strategic Planning Committee East Falls Village

## Consultants:



Sarah Spellman, Principal  
Sarah.Spellman@CLAconnect.com  
609-760-2991

Autumn Hassinger, Senior Consultant  
Autumn.Hassinger@CLAconnect.com  
267-419-1132



CLAconnect.com

