

5-Year Strategic Goals - Work Plan

A: Strategic Focus: Broaden and deepen the services we provide, aligned with our mission.					
					Committee Assigned
1. Strategic Goal: Expand the variety of programming and deepen existing programming, including times offered and participation rates, utilizing needs/wants assessment and evaluation information.	Timing	Lead	Indicators	Status	Personnel & Program
Tactical Activities:					
a. One or two at a time, experiment with new offerings (service type*[1], timing, locations, etc.), assessing and recording the participation rates, costs, logistical issues, and feedback of participants.	Jan. '22 – ongoing	Executive Director	Concrete data and input regarding success/failure	Evening meal/activity piloted October '22. Evaluation? Future plan(s)?	
b. Based on the above, retain and market those activities that are successful, and discontinue those that are not.	Jan. '22 – ongoing	Executive Director	Successful, measured expansion of offerings		
c. Assess existing programming for expansion opportunities, based on participant feedback.	Jan. '22 – ongoing	Executive Director	Measured expansion of existing services	Began reviewing various program offerings	
2. Strategic Goal: Explore options to expand access, by offering programming and services that are not based in our facilities, utilizing our expertise and experience in partnership with other organizations.	Timing	Lead	Indicators	Status	Personnel & Program
Tactical Activities:					
a. Identify in priority order the specific organizations to approach with partnership ideas and opportunities, such as churches, villages, libraries, etc.	Jan. '22 – ongoing	Executive Director	Potential sites identified and approached		
b. Run trial programs as developed and evaluate issues/problems, successes, client feedback, and partner feedback.	Sept. '22 – ongoing	Assistant Director	Concrete data and input regarding success/failure		
c. Use the assessment of trial programs to establish permanent programming partnerships with other organizations' locations.	Jan. '23 – ongoing	Assistant Director	Location & programming partnerships in place		
3. Strategic Goal: Explore and develop partnerships with secondary & post-secondary schools for student involvement with seniors to promote inter-generational relationships.	Timing	Lead	Indicators	Status	Personnel & Program
Tactical Activities:					
a. Identify in priority order the specific schools to approach with partnership ideas and opportunities, such as internships, work/study, volunteering, tech support, mentoring, visiting, etc., and put models into proposal form.	Sept. '22 – Aug. '23	Executive Director	Models developed; potential partners approached		
b. Run trial programs as developed and evaluate issues/problems, successes, client feedback, and student feedback.	Sept. '23 – Aug. '25	Assistant Director	Concrete data and input regarding success/failure		
c. Use the assessment of trial programs to establish permanent programming partnerships with schools.	Sept. '24 – Aug. '26	Assistant Director	Programming partnerships in place		

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B: Strategic Focus: Enhance our communications, marketing, & engagement capabilities.					
1. Strategic Goal: Develop and implement a comprehensive Communications and Marketing Plan, including: branding, website, newsletters, media use, social media, etc.	Timing	Lead	Indicators	Status	Fund Dev. & PR
Tactical Activities:					
a. Engage a marketing consultant to develop the plan with board & staff.	Mar. – Sept. '22 Postponed Indefinitely	Executive Director	Plan budgeted & developed Not Applicable at this time	Dawn Bousamra to provide BOD overview of all planned actions for 2022/2023	
b. Review planned actions & make recommendations for additions/changes. Implement plan new communications strategies as recommended , including enhanced use of “positive stories.”	Oct. '22 - ongoing	Executive Director	Ongoing implementation of plan	Implemented a monthly update on Communications and Public Relations activities	
c. Emphasize public relations regarding new programming, locations, etc., relative to Goals A.1-3.	Oct. '22 - ongoing	Executive Director	Special, time-focused communications		
d. Promote special, individual-or-business-sponsored, community events and activities for seniors and their families.	May '23 - ongoing	Executive Director	Events developed & regularly held		
2. Strategic Goal: Develop and implement specific communication and engagement activities related to potential donors, to build the number of donors and the amounts given.	Timing	Lead	Indicators	Status	Fund Dev. & PR
Tactical Activities:					
a. Engage a consultant to create a comprehensive fund development plan with board and staff.	June '22-ongoing Postponed Indefinitely	Board and Executive Director	List developed Not Applicable at this time	No action to be taken	
b. Build a structured program for donor recognition and appreciation.	Jan.'23-ongoing	Board and Executive Director	Annual event held		
3. Strategic Goal: Target specific communication efforts to organizations with which we want to see enhanced referrals and collaboration.	Timing	Lead	Indicators	Status	Fund Dev. & PR
Tactical Activities:					
a. Identify and prioritize organizations that have potential to make more referrals to BSR, building relationships with active, regular outreach.	July '22 - Dec '22	Assistant Director	Improved # of referrals		
b. Hold meetings or events to inform and engage key leaders from those organizations about BSR's services.	July '22 - Dec '22	Assistant Director	Improved # of referrals		
c. Track numbers of new referrals & sources for follow-up.	ongoing	Assistant Director	Increasing # over time		

5-Year Strategic Goals - Work Plan

C: Strategic Focus: Strengthen and deepen our physical, financial, operational capacity & human resources					
1. Strategic Goal: Explore and perhaps initiate a group of non-profit/for-profit organizations for collaboration and advocacy, & better coordination of services for Benzie seniors.	Timing	Lead	Indicators	Status	Leadership
Tactical Activities:					
a. Establish a county-wide task force to focus on seniors' needs.	Jan.-May '24	Executive Director	Task force in place		
b. Develop an agenda of prioritized annual objectives for the task force.	Jan.-May '24	Executive Director	Objectives identified		
c. Support the task force's objectives with targeted public communications activities.	May '24 - ongoing	Executive Director	Communications implemented		
d. Establish a regular annual or semi-annual, informal event for the task force with local, state, and national elected officials to inform, influence, and engage them.	July '24 and following years	Executive Director	Event developed & held annually		
2. Strategic Goal: Develop and implement board recruitment, training, and development policies and practices. Expand board committees to include community members who are not on the board.	Timing	Lead	Indicators	Status	Governance
Tactical Activities:					
a. Develop a structured board recruitment, orientation, and development plan.	Jan.-June '22	Board Leadership	Plan developed & implemented	Began initial review/update of the New Board Member Orientation process. Updated BoD Composition Summary and added "Term Status"	
b. Assess committee structure and build a bigger, stronger base of volunteers for engagement in board committees.	Jan.-June '22	Executive Director and Board	Increase in committee participation	Updated Committee structure and developed/adopted Charters for each Committee	
3. Strategic Goal: Determine current and future facility needs considering flexibility over time, assess options for meeting those needs, and pursue opportunities for expansion of space.	Timing	Lead	Indicators	Status	Governance w/Finance Support
Tactical Activities:					
a. Form a task force to develop <i>at least</i> two feasible plans for facility expansion, including approximate cost for each plan and ranking of desirability .	Jan.-Dec.'22	Board	Task Force underway	Launched development of the Facility Needs Taskforce and began Facility Benchmarking process	
b. Tie down commitments for the chosen plan, including a timeline for implementation.	Jan.-June'23	Board Committee	Commitments made		
c. Develop and implement a fund development campaign specifically for facility improvements.	July'23 – June'24	Board Committee	Plan made & underway		
d. Complete new facility expansion project(s).	Fall '23- Dec.'26	Board	Increase in space available		

5-Year Strategic Goals - Work Plan

C: Strategic Focus: Strengthen and deepen our physical, financial, operational capacity & human resources (Continued from prior page)					
4. Strategic Goal: Develop and implement a plan for ongoing staffing expansion and improvement, including budget ramifications, skills needed, and priorities.	Timing	Lead	Indicators	Status	Pers. & Prog. w/Finance Support
<i>Tactical Activities:</i>					
a. Develop a list of potential new F.T. or P.T. staff positions*[2] and assess priorities, associated costs, and set timing targets.	Apr.– Dec.'22	Executive Director	List in place & process underway		
c. Implement a staff expansion plan accordingly, in both budgeting and operations.	Jan.'23 – Dec.'26	Executive Director	Plan being implemented		
d. Develop an ongoing staff development and continuing education plan.	Jan. '23 - ongoing	Executive Director			
5. Strategic Goal: Continue to diversify and pursue new revenue options.	Timing	Lead	Indicators	Status	Fund Dev. & PR w/Finance Support
<i>Tactical Activities:</i>					
a. Explore and pursue grants for inter-generational programming, especially for Goal A.2 but also for other concepts for inter-generational programming.	July '23 - ongoing	Assistant Director	New funding actively pursued		
b. Pursue new revenue opportunities for general operations and/or specific programming.	Jan. '23 -ongoing	Assistant Director	New funding actively pursued	Worked with the Jamie Gray Group on the inaugural BSR Golf Outing and raised \$5k	
c. Consider and pursue opportunities for new or modified facilities to generate additional revenue.	Jan. 23 - ongoing	Executive Director and Finance Committee	Recommendations made		
d. Proactively build support for continued millage support among county residents.	Ongoing	Executive Director and Board	Survey & voting results		
6. Strategic Goal: Develop a thorough assessment of current volunteers' interests and expertise, for the purpose of better utilizing their skills.	Timing	Lead	Indicators	Status	Governance
<i>Tactical Activities:</i>					
a. Survey all current volunteers to determine areas of expertise, interest, and willingness to serve.	Apr. '23 – June '23	Assistant Director	Survey completed; action underway	Survey of volunteers conducted March '22. Results of follow-up?	
b. Hold informal meetings with small groups of volunteers to promote a higher degree of involvement, and to identify names of potential, additional volunteers.	July-Dec. '23 - ongoing	Executive Director	Reports about meetings and results		
c. Develop and conduct an annual volunteer recognition and appreciation event, including media coverage.	Jan. '23 - ongoing	Assistant Director	1 st and subsequent events held		

^[1] Mental health, social, inter-generational, medical, nutritional, educational, special interest/hobby groups, etc.

^[2] Could include part time or full time positions such as: Communications Coordinator; Fund Development Manager; Social Worker; Assessment & Care Management Specialist; Community Relations Manager; Data Support Specialist; Human Resources Manager; Volunteer Coordinator; etc.