



Homer Senior Citizens Inc.

Strategic Plan 2013-2016

Executive Summary

VISION: All Homer Senior Citizens have opportunities to live life to its fullest!

MISSION: To offer seniors with “essential services” housing (assisted and independent), adult day services, nutrition, education, transportation, and social activities that promote independence and a healthy continuum of care.

CORE VALUES: Respectful – Responsible – Accountable – Trusting – Loyal – Collaborative – Integrity – Excellence – Quality – Service

2013 – 2016 Strategic Goals

GOALS	INDICATOR & TARGET
<ul style="list-style-type: none"> Customer: Increase awareness of HSC and support for its programs within the community of Homer. 	<ul style="list-style-type: none"> Increase membership 10% year Community awareness of HSC ‘spot survey’ (2xyear) demonstrates 10% annually
<ul style="list-style-type: none"> Financial: Maintain financial stability and security and increase diversity of resources. 	<ul style="list-style-type: none"> Diversify and grow resources to meet plan Reserves rate of growth
<ul style="list-style-type: none"> Process: Improve service quality through communication, documentation and follow through. 	<ul style="list-style-type: none"> Program evaluations completed regularly with continuously improving outcomes
<ul style="list-style-type: none"> People: Promote staff development, retention, and recruitment efforts to ensure HSC has an adequate and well qualified staff. 	<ul style="list-style-type: none"> Develop internal measures, e.g. annual survey of staff on process and people goals Overall rating on exit surveys improve x% Declining vacancy rates
<ul style="list-style-type: none"> Capital: Develop a plan and assure resources to maintain existing facilities and grow to meet community needs. 	<ul style="list-style-type: none"> Inventory completed and ‘every-green’ Deferred maintenance plan and related expenses are less than 10% of total assets.

Strengths	Opportunities
<ul style="list-style-type: none"> • Strong history & great mission • HSC is a membership corporation • Board Training w/ Mgrs included • Healthy environment – Non-Smoking Campus • Financially secure • New Executive Director • Strengthening internal teamwork • High quality and satisfaction of employees and volunteers • Work well with other community partners (hospice, hospital, medical facilities, EMTs) • Ownership of Independent Living program onsite • One of Top 10 employers in Homer • Borough benefits from jobs in social services • Seniors tend to buy local • Supportive regulators – they want us to succeed • Unique range of services and structure 	<ul style="list-style-type: none"> • Explore and strengthen additional collaborative partnerships, e.g. MAPP • Partner as lead agency with others on grants • Weekly clinic for residents (potential for employees) • Expand dementia/Alzheimer’s services • Remodel kitchen, dining room, dishwashing station • Acquire more land to expand housing • Develop new image of senior community
Weaknesses	Threats
<ul style="list-style-type: none"> • HSC is a “Big Secret” – no marketing • 2 logos–no unified identity causes division and lack of cooperation • No dementia/Alzheimer units or ‘walking zone’ • No capital improvement program or funding • No fundraising / development efforts to support HSC e.g. “Friends of the HSC” • Poor design – ‘add on’ configuration • Ramp to Assisted Living Terrace is dangerous • Problem with kitchen design and plumbing • Misperception that HSC is a government entity • Balloon payment due in 2026 for loan on Terrace • Inadequate phone system • Lack of community interest in senior issues • Difficulty filling key vacancies • Pay scale not competitive 	<ul style="list-style-type: none"> • Fewer grant sources to support programs and operations • Limited options for third party revenue • Lack of available, qualified staff in the workforce • Baby boomers coming in larger numbers – we’re not ready • Lack of financial support from City of Homer • Weak local economy (changes to fishing/tourism regulations) • Relatively high cost of living • No Medicare funding for Assisted Living • No public transportation in Homer

Environmental Analysis

Sector	Observations
Economy	Rising cost of energy, housing and fuel. Natural Gas Conversion coming to Homer.
Technology	Improved Technology for telephones, resident monitoring system, and office programs available.
Government	KPB, State of Alaska and Federal Government supports senior programs
Demographics	In retirement communities, schools suffer from lack of support for bonds, etc. but seniors volunteer
Social Structure	Need for more on-site activities aimed at independent residents and members, need for exercise room with full equipment
Natural Environment	HSC is on a slope and we have a lot of ice. Largest town in the Homer area and other out-lying communities would like to be served
Industry	New assisted living facilities built in Kenai and Soldotna. Need for dementia/Alzheimer's wing a desire of communities
Organization	New Board Directors, Key position recruitment still required for Assisted Living Manager

Environmental Issues

Summarize 3 to 5 key environmental issues and trends that will have the greatest impact over the next 3-5 years. For each issue and trend, describe the implications to the organization.

Issue/Trend	Implications
Lack of Medicare funding for Assisted Living	Reduces number of residents due to ability to pay
Government Funding is being reduced on grants by 5%	Reduced revenue will cause budget cuts on supplies and increased fundraising efforts
Increase in senior population by 10% annually	Increased seniors will impact already maxed service system
Natural Gas Conversion	Requires over \$500,000 to convert to natural gas. Requires funding source and project manager to review

Major Community Partners

Major Partner	Role	Strengths	Weaknesses	Potential Implications
South Peninsula Hospital	Interact socially, share programs, continuum of care	Sharing of information, physically close to facility	Some duplication of services	Develop MOAs to ensure non-duplication
Homer MAPPS				
Kenai Peninsula Borough	Provide funds to support programs	Shows Borough support of programs	Level of funding is not always the same difficult to budget	Revenue is getting tighter throughout the entire state
United Way	Provide funds to support programs	Shows support of programs	Distance to Kenai makes it challenging for us to participate in Funding Campaigns to help support the United Way. Level of funding is not always the same – difficult to budget	Revenue is getting tighter throughout the entire state
Rasmussen Foundation	Funds Large Programs	Successful grant applications in the past	Multiple capital programs – creates need to prioritize	Priorities can change rapidly
Emerging Partner Issues: Loss of government funding creating a higher sense of need in non-profits				

Customer Focus

Customer	Customer Need	Implications
Individual members (all)	Socialization, convenience of main meal not being prepared at home, support services to maintain independence.	Potential residents, potential board directors, potential funders
Residential members	Assuring needs are being met social and medically	Residents are comfortable and enjoy life
Potential / future members	Awareness of services available, good organization, financially secure organization	Sustainable programs, potential residents, members
Family members of seniors	Confidence/assurance their loved ones are cared for, Safe place for loved ones	Good Public Relations, potential members
Homer citizens	Need an outlet for seniors	Increased services, members, and financially sustains programs

Risk Management Plan

Describe the top 3-5 risks to achieving your Strategic Priorities and associated plans to mitigate risks

Description of Risk	Likelihood (H, M, L)	Impact (H, M, L)	Mitigating Activities	Contingency Plan
Failure to save funds for balloon payment of \$2.5M due in 2026 for Terrace	H	H	Increase revenue	Renegotiate with AHFC within ~ 6-8 years prior.
Building Infrastructure is in need of repairs and maintenance	H	H	Increase revenue	Develop Financial Plan and Priority List to address repairs
Federal Government is reducing senior funding for grants	H	H	Increase revenue	Begin and develop Donor Program
Operating funds for 3 months	H	H	Increase revenue	Begin budget assumptions during the FY14 Budget cycle

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