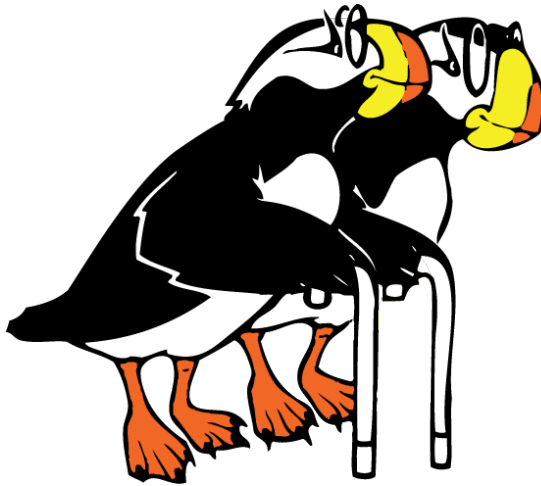


# Homer Senior Citizens, Inc. Three Year Strategic Plan 2016-2019



February 15, 2017



# Homer Senior Citizens Inc.

## Strategic Plan 2016-2019

### Executive Summary

<p><b>VISION:</b> All Homer Senior Citizens have opportunities to live life to its fullest!</p>	<p><b>MISSION:</b> To offer seniors housing (assisted and independent), nutrition, education, transportation, and social activities that promote independence and a healthy continuum of care.</p>
<p><b>CORE VALUES: Respect – Accountability – Trust / Integrity – Quality</b></p>	
<p><b>2016 – 2019 Strategic Goals</b></p>	
<p><b>GOALS</b></p>	<p><b>INDICATOR &amp; TARGET</b></p>
<ul style="list-style-type: none"> <li>• Customer: Increase awareness of HSC and support for its programs within the culture of HSC and the community of Homer.</li> </ul>	<ul style="list-style-type: none"> <li>• Increase membership 10% per year</li> <li>• Community awareness of HSC ‘spot survey’ (2x/year) demonstrates 10% annually</li> </ul>
<ul style="list-style-type: none"> <li>• Financial: Maintain financial stability and security and increase diversity of resources.</li> </ul>	<ul style="list-style-type: none"> <li>• Diversify and grow resources to meet plan</li> <li>• Operating Reserves rate of growth</li> </ul>
<ul style="list-style-type: none"> <li>• Process: Improve service quality through communication, documentation and follow-through.</li> </ul>	<ul style="list-style-type: none"> <li>• Program evaluations completed regularly with continuously improving outcomes</li> </ul>
<ul style="list-style-type: none"> <li>• People: Promote staff development, retention, and recruitment efforts to ensure HSC has an adequate and well-qualified staff.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop internal measures, such as annual survey of staff on process and goals</li> <li>• All–staff training attendance</li> <li>• Overall rating on exit surveys improve 5% from previous year</li> <li>• Declining vacancy rates</li> </ul>
<ul style="list-style-type: none"> <li>• Capital: Develop a plan and ensure resources to maintain existing facilities while growing to meet community needs.</li> </ul>	<ul style="list-style-type: none"> <li>• Inventory completed and plan for replacements</li> <li>• Deferred maintenance plan and related expenses are less than 10% of total assets.</li> </ul>



# Feedback On Strategic Goals

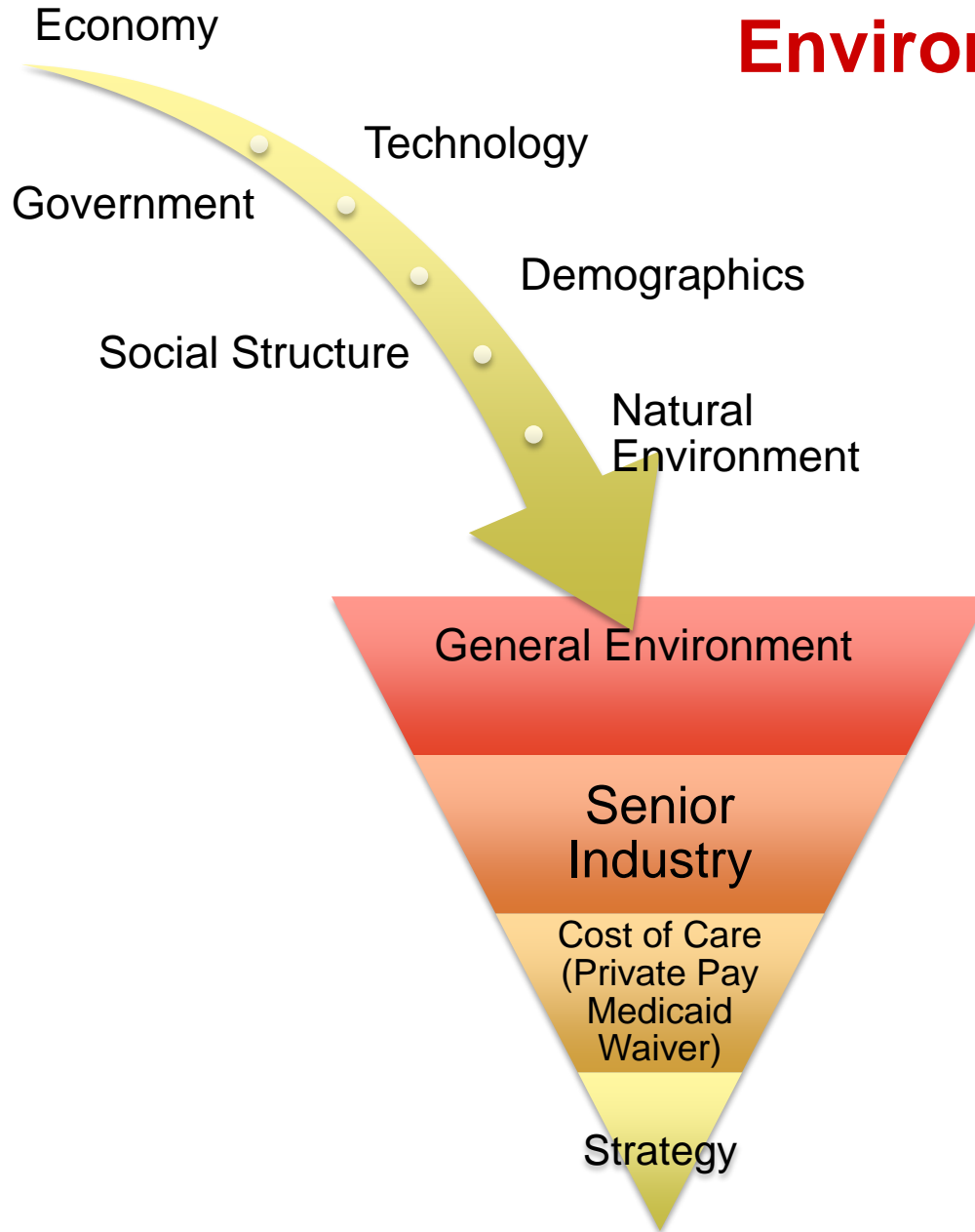
2016-2019 Strategic Goals	
GOALS	FEEDBACK
<ul style="list-style-type: none"> <li>Customer: Increase awareness of HSC and support for it's programs within the community of Homer.</li> </ul>	<p>Wine Tasting Fundraiser – September</p> <p>Create new programs for more active seniors (Sewing, Educational Speakers, Senior Summit)</p> <p>A Place for Mom</p>
<ul style="list-style-type: none"> <li>Financial: Achieve financial stability and security.</li> <li>Pursue gaming permit – pull tabs</li> <li>Add endowment and fundraising efforts</li> </ul>	<p>Home Health, Restructure Billing for Assisted Living</p> <p>Increased grant – Flooring, Furniture, Painting,</p> <p>Continue with jail contract, Begin Solicitations for Foundation Grants</p> <p>Securing bids for Sprinkler system in Adult Day</p>
<ul style="list-style-type: none"> <li>Process: Continue and maintain Improved service quality through communication, documentation and follow-through.</li> </ul>	<p>Held regular meetings with staff / managers</p> <p>Complete Accreditation Process \$2,900</p>
<ul style="list-style-type: none"> <li>People: Promote staff development, retention, recruitment efforts to ensure HSC has an adequate and well-qualified staff.</li> </ul>	<p>Retention/Recruitment efforts include On-line training, new employee hiring process, exit interview reviews</p>



Strengths	Weakness
<ul style="list-style-type: none"> <li>• Strong history &amp; great mission</li> <li>• HSC is a membership corporation</li> <li>• Board training with Managers included</li> <li>• Healthy environment – Non-Smoking Campus</li> <li>• Financially secure</li> <li>• Strong internal teamwork</li> <li>• High quality and satisfaction of employees and volunteers</li> <li>• Work well with other community partners (hospice, hospital, medical facilities, EMTs)</li> <li>• Ownership of Independent Living program onsite</li> <li>• One of Top 10 employers in Homer</li> <li>• Borough benefits from jobs in social services</li> <li>• Seniors tend to buy local</li> <li>• Supportive regulators – they want us to succeed</li> <li>• Unique range of services and structure</li> <li>• Organization structure diagrammed</li> <li>• Executive Director – since 2011</li> <li>• Updated policies to meet regulations</li> <li>• Updated By-Laws</li> <li>• Graduated service delivery</li> <li>• Hiring CNAs</li> <li>• Currently fully staffed</li> <li>• D.A.S.H. Registered Dietician – to review menu</li> <li>• Employees put service above self</li> <li>• Restructured ADS – Veterans</li> <li>• Great relationship with Gear Shed (In-kind donation)</li> <li>• Senior Summit</li> </ul>	<ul style="list-style-type: none"> <li>• No Dementia/Alzheimer units or ‘walking zone’</li> <li>• No capital improvement program or funding</li> <li>• No fundraising/development efforts to support HSC</li> <li>• Poor design – ‘add on’ configuration</li> <li>• Ramp to Assisted Living Terrace is dangerous</li> <li>• Problem with kitchen design and plumbing</li> <li>• Balloon payment due in 2026 for loan on Terrace</li> <li>• Lack of community interest in senior issues</li> <li>• Difficulty filling key vacancies</li> <li>• Pay scale not competitive</li> <li>• Misinterpretation of senior issues (i.e., seniors don't pay taxes)</li> <li>• Not enough space...Parking lot – too small</li> <li>• Van is in need of replacement</li> <li>• No generator</li> <li>• No light in over-flow parking</li> <li>• Flooring needs replaced – safety issue</li> <li>• Not enough Senior Housing</li> <li>• Remodel nursing/staff offices – important</li> <li>• Land limit</li> <li>• Fundraising</li> <li>• Sewer system at Pioneer Vista needs repaired</li> <li>• Concrete sidewalks need repaired for safety</li> <li>• Terrace and Senior Center need painting</li> <li>• Senior Center crawl space needs ventilation and insulation</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Explore and strengthen additional collaborative partnerships, i.e., MAPP</li> <li>• Partner as lead agency with others on grants</li> <li>• Weekly clinic for residents (potential for employees)</li> <li>• Expand Dementia/Alzheimer's services</li> <li>• Remodel kitchen, dining room, dishwashing station</li> <li>• Acquire more land to expand housing</li> <li>• Develop new image of senior community</li> <li>• Natural gas conversion</li> <li>• The city donated \$10,000, State donated \$100,000</li> <li>• Rasmuson Foundation</li> <li>• Transitional nursing grant</li> <li>• Becoming accredited</li> <li>• Pulls tabs/gaming</li> <li>• Tap into Corporation Subaru/Exxon</li> </ul>	<ul style="list-style-type: none"> <li>• Fewer grant sources to support programs and operations</li> <li>• Limited options for third party revenue</li> <li>• Lack of available, qualified staff in the workforce</li> <li>• Baby boomers coming in larger numbers – we're not ready</li> <li>• Lack of financial support from City of Homer</li> <li>• Weak local economy (changes to fishing/tourism regulations)</li> <li>• Relatively high cost of living</li> <li>• No Medicare funding for Assisted Living</li> <li>• No public transportation in Homer</li> <li>• Medicaid waiver denials</li> <li>• Health Insurance</li> <li>• Reduced funding possible from State</li> </ul>



# Environmental Analysis





# Environmental Analysis

Sector	Observations
Economy	Rising cost of energy, housing. Legislative Budget Crisis. City of Homer budget crisis. Timely denials for Medicaid Waivers.
Technology	Improved Technology for telephones, resident monitoring system, and office computers for staff. -- Need for Social Media
Government	KPB supports senior programs, Licensing and Ombudsman Office both support HSC operations
Demographics	Ranked as 2 <sup>nd</sup> fastest growing demographics of seniors in the State. Growing disconnect in perception of senior contributions to the community.
Social Structure	Need to improve activities for independent seniors and residents.
Natural Environment	Recognize we are in Seismic Zone 5. HSC above Tsunami zone. Prone to have power outages.
Industry	Need for Dementia/Alzheimer's wing a desire of community. Need for specific licensed, skilled staff. Need for Veteran Housing.
Organization	Board and staff have clear position descriptions. Policies address health and safety of seniors.



# 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 Governor Walker and Legislature not on same page for Medicaid Expansion, State Plan to bill on acuity.	Reduces number of residents due to ability to pay Health Insurance to support residents in need May open opportunities for transitional care into ALF
State of Alaska and City of Homer Budget Crisis Government funding is being reduced on grants by 5% City of Homer increasing sales tax	Decreased funding in Nutrition and Adult Day Services Reduced revenue will cause budget cuts on supplies; need increased fundraising efforts Need to find additional revenue sources, restructuring Assisted Living service rates
Increase in senior population by 10% annually	Increased number of seniors will impact already maxed-out service system
Lack of funding for Veterans' Assisted Living Lack of affordable housing for Veterans	Adult Day Services Approved for Veterans Services Continue lobbying Senator Sullivan -- to keep Veterans in Homer
Natural Gas Conversion	Lowered utility costs will allow us to budget for maintenance.
Need land for Dementia/Alzheimer's wing	Property acquisition and development is a huge expense



# Major Community Partners

Major Partner	Role	Strengths	Weaknesses	Potential Implications
City of Homer	Project support /financial support	City willing to listen	City not committed to funding as of 2016	May lose funding options for grants
Kenai Peninsula Borough	Major Funding Source	Grants for Adult Day Services and Senior Center	May be reduced as it is aligned with State funding	Losing funding will cause us to reduce staff and/or services
South Peninsula Hospital	Current MOA	Great relationship with staff and LTC	Competing for same seniors and services	More opportunities to collaborate
State of Alaska SDS	Project support	Great relationship with state officials	Reduced funding and increased denials in Waiver Process	Delay in payments, rely on Care Coordinators to ensure services are in plan
Rasmuson Foundation, Additional foundations coming in	Major Funding Source	Always available to help us with grants and funding Received 2 Grants	Prioritizing the needs of the projects	Flooring for senior center and Assisted Living, Alzheimer's wing
Other Non-Profits (targeting 501c3s)	10 MOAs in place Host for Provider Meetings (eg. Hospice, ILC, other ALFs, etc.)	Great relationships, no need to duplicate service	Lack of marketing material	Provider meeting to strengthen relationships

**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, Proper Nutrition, Exercise, Educational	Potential residents, support, great knowledge base to tap into
Residential members	Socialization, Activities, Safety and Security	Happier residents and families
Potential / future members	Social Structure	Potential Volunteers, Board Members
Family members of seniors	Better communication and understanding of HSC operations	Happier residents and families
Homer citizens	Social structure and interaction with seniors	Greater visibility, increased membership and donations



# 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 to 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 grants for senior funding	H	H	Increase revenue	Begin and develop Donor Program
SPH competing for same customer base	H	M	Increase Collaboration through interagency memorandums of agreement	Provide HCBS programs to keep seniors at home,