

Strategic Plan

Capitol Hill Village

FY2014-2018

Introduction

The Board of Directors and Staff of Capitol Hill Village developed this strategic plan, which provides a four-year roadmap for financial and volunteer supports, services, and organization development. The Board of Directors and staff will review progress quarterly and will review and update the plan annually as needed.

This plan was developed with broad involvement and guidance from the Board of Directors and staff. Phase One of this plan was completed in the summer of 2012 using Collective Method Consulting. During this phase, the board and staff held a retreat where they participated in an environmental scan, identified strengths, and developed general priorities for the future. In addition, the board revised the mission and vision statements for the organization.

Phase Two of the process was completed in the winter of 2013, when the board completed a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis and updated the organization's values.

Phase Three of the process was completed in the summer of 2013, when the board developed the goals, objectives, and strategies for the organization to reach in the coming three years. The Presidential Advisory Committee (PAC) served as the working body to develop the goals, objectives, and strategies in consultation with the board and staff. The PAC included seven board and staff members, and board committee chairs were asked to attend and participate in the discussion of goals related to their particular areas. The PAC held meetings from April to August, and meetings were facilitated by the executive director.

Mission: To sustain and enrich the lives of members and the community of Capitol Hill residents for the long term

Vision: Quality Life on Capitol Hill

Organizational Values

Diversity: Variety and difference make Capitol Hill interesting and fun

Dignity: Our members are worthy of honor and esteem

Privacy: Personal matters should be kept personal

Independence: Our members are in charge of their own lives

Community: We foster a neighborhood that brings people together

Generosity: Our volunteers and supporters happily share their time and resources with others

Integrity: You can depend on us

Expertise: We have the knowledge and skills to get things done

Service: We provide the assistance our members need and request

Respect: Our members and volunteers are treated with courtesy, consideration, and gratitude

Strategic Environment: SWOT Analysis

<p>Strengths</p> <p><u>Community based</u>: Caring, engaged, cohesive, accessible, inclusive</p> <p><u>Members</u>: Vibrant, engaged, social, and willing volunteers</p> <p><u>Board and Volunteers</u>: Talented, dedicated, skilled, multigenerational</p> <p><u>Partnerships</u>: Strong national and community partners</p> <p><u>Services</u>: Professional, address care coordination needs, fill a unique service niche, improve constantly, innovative, and evolving</p> <p><u>Staff</u>: Respected nationally and locally; dedicated; highly skilled</p> <p><u>Social opportunities</u>: Offer a variety of social and cultural get-togethers and village-wide events</p> <p><u>Aging and health policy leverage</u>: Recognized advocate for improving age-friendliness of Capitol Hill and DC</p>	<p>Weaknesses</p> <p><u>Perceptions</u>: Cliquish, only for old people; nothing to offer healthy older adults; Difficult to ask for services</p> <p><u>Diversity</u>: Not sufficient racial or economic diversity</p> <p><u>Marketing</u>: Limited messaging; Limited public relations</p>
<p>Opportunities</p> <p><u>Endowment Fund</u>: Future potential for generating income; opportunities for growth; financially astute Board of Trustees</p> <p><u>Social membership</u>: Sizable community of well-to-do and generous supporters</p> <p><u>Intern program</u>: Mutually beneficial experience for social work/public health students; fresh ideas for us and practical experience for them</p> <p><u>Marketing</u>: New and unexplored approaches to marketing; possibility of seeking professional advice</p> <p><u>Vetted vendors</u> : Build on current strength to grow, manage, monitor available number and skill</p> <p><u>Leadership</u>: Capitol Hill community a great source of leadership with appropriate skills and experience</p> <p><u>Retain frail membership</u>: Plans and programs underway for creative livable communities options that include housing, transportation, health and social innovations</p> <p><u>Other Villages in DC</u>: Partnering with other Villages for greater policy leverage and possible corporate funding and advocacy</p>	<p>Threats</p> <p><u>Sustainability</u>: Lack of revenue, small membership numbers insufficient to support costs, member-focused giving base</p> <p><u>Marketing</u>: Lack of success (to date) reaching out to “I’m not ready yet” population</p> <p><u>Operations</u>: Increased operating expenses, members who join in crisis; retaining experienced, professional staff</p> <p><u>Culture</u>: Perception of being cliquish</p> <p><u>Board leadership</u>: Limited response to the effort of recruiting potential board members (both from the Village membership and from the Capitol Hill community) with the appropriate level of interest, experience, and skills</p> <p><u>Lack of a continuum of care</u>: Lack of appropriate, accessible housing; Movement by members to institutional care; Lack of purposeful living for frail members</p> <p><u>US Ageism</u>: Messages and perceptions of older adults</p>

Strategic Direction

Based on the Board of Directors' understanding of Capitol Hill Village's mission, vision, and core values, as well as its strengths, weaknesses, opportunities, and threats in the current environment, the next three years will be a time of assessing approaches to its work. The Board has identified four key roles of Capitol Hill Village that define the directions and focus of the organization with focus its resources:

SERVICE

Capitol Hill Village connects members to high-quality, high-value, and effective services that meet their needs with trained volunteers, professional staff, vetted vendors, and public and private partnerships.

COMMUNITY

Capitol Hill Village creates a supportive, accepting community that embraces diversity and provides mutual aid to enrich and sustain the lives of both members and volunteers.

EDUCATION

Capitol Hill Village educates its membership and other Capitol Hill residents on how to live healthy and productive lives, using the expertise, skills, and talents of its members, volunteers, and staff.

ADVOCACY

Capitol Hill Village advocates for its members at the individual, local, and national level to ensure their access to appropriate healthcare, legal advice, reliable vendor services, and a safe, people-friendly community.

Goal 1	Objective	Responsible Committee	Strategy	Timeline
Build Financial Sustainability	Increase revenue from the endowment fund	Endowment Trust Board	<ul style="list-style-type: none"> Develop endowment fund-related educational program for members 	FY 2014
		Executive Committee	<ul style="list-style-type: none"> Increase communication between endowment fund board and board of directors 	FY 2014
	Increase revenue from corporate sponsors and donors	Philanthropy Committee	<ul style="list-style-type: none"> Consult with fundraising expert to develop an outreach plan to corporate donors 	FY 2014
		Marketing Committee	<ul style="list-style-type: none"> Develop a marketing plan for corporate/large donors 	FY 2015
		Executive Committee	<ul style="list-style-type: none"> Develop an operational plan for use of corporate donations over \$10,000 	FY 2015
	Develop strategic policy for changes in dues structure	Finance Committee	<ul style="list-style-type: none"> Explore concept of minimum dues and suggested dues 	FY 2015
<ul style="list-style-type: none"> Explore concept of graduated dues structure for moderate income and younger members 			FY 2015	
<ul style="list-style-type: none"> Present immediate and long-term plan for dues to be considered by Board 			FY 2015	
Increase revenue from grants to 10 percent of total revenue to cover special projects	Philanthropy Committee	<ul style="list-style-type: none"> Perform strategic research plan for grant applications 	FY 2014	
Increase revenue from social memberships to 20 percent of membership revenue ¹	Marketing Committee	<ul style="list-style-type: none"> Implement strategic marketing plan for membership 	FY 2014	

Goal 2	Objective	Responsible Committee	Strategy	Timeline
Diversify Membership to reflect the community of Capitol Hill	Increase number of members who are of color to 15% ⁱⁱ	Member Outreach	<ul style="list-style-type: none"> • Increase number of people of color on the board • Develop programming with strategic partnerships with local organizations to encourage diverse membership development 	FY 2016 FY 2015
	Increase visibility & community of LGBTQ community within the Village	Member Outreach	<ul style="list-style-type: none"> • Increase programming around LGBTQ issues for members and community • Develop partnerships with local organizations to provide increased services to LGBTQ members • Participate in the DC Senior LGBTQ Coalition 	FY 2015 FY 2015 FY 2014
	Increase the diversity of socio-economic levels, particularly those in middle income thresholds	Finance	<ul style="list-style-type: none"> • Explore the addition middle income tier to membership plus • 	FY 2016

Goal 3	Objective	Responsible Committee	Strategy	Timeline
Build community through social engagement and through helping others	Increase the number of members engaged in social activities to 80% ⁱⁱⁱ	Member Outreach	<ul style="list-style-type: none"> Develop & implement internal marketing plan to engage new members Learn the skills, talents, and interests that our members want to share with the CHV community Engage every new member in at least one social activity within three months of joining Create at least 10 new member-driven social activities based on member interest and requests 	FY 2014 FY 2014 FY 2014 FY 2016
	Increase the number of members who are Village volunteers to 50% ^{iv}	Volunteer & Member Outreach	<ul style="list-style-type: none"> Create on-going recruitment activities that encourage membership volunteerism Better engage new members in the volunteer experience Improve the engagement of frail members in Village volunteerism 	FY 2014 FY 2015 FY 2015
	Increase opportunities for life-long learning	Strategic Initiatives: Social & Health	<ul style="list-style-type: none"> Create a process to identify how members want to be engaged in life-long learning activities Develop partnerships with local organizations to provide life-long learning opportunities Develop the community education symposiums 	FY 2015 FY 2015 FY 2014
	Enhance the volunteer experience in the Village community	Volunteer & Member Outreach	<ul style="list-style-type: none"> Develop opportunities for specialized training of volunteers Create opportunities to match volunteer leader skills to programs of interest Develop training and social opportunities for specific categories of volunteers Improve ongoing recognition of volunteers Develop formal process for collecting volunteer feedback on their experiences 	FY 2014 FY 2014 FY 2014 FY 2014
	Increase engagement of donors in CHV community	Philanthropy	<ul style="list-style-type: none"> Increase communication with donors on CHV programs, services, and community Solicit feedback from donors on CHV operations Increase communication with members on the role and participation of donors 	FY 2015 FY 2015 FY 2015

Goal 4	Objective	Responsible Committee	Strategy	Timeline
Deliver high quality, highly valued services to members through volunteers, vendors, staff and public/private partnerships	Improve the quality and breadth of vendors services	Strategic Initiatives	<ul style="list-style-type: none"> Leverage relationships with vetted vendors to provide new and improved services to members Improve function of CHV Connect and make it sustainable 	FY 2016
	Develop partnership with DCOA to increase member use of transportation, meal delivery & case management services	Strategic Initiatives	<ul style="list-style-type: none"> Define and optimize roles of staff and volunteers as they relate to DCOA programs 	FY 2014
	Increase impact and quality of the care coordination program	Strategic Initiatives: Social & Health	<ul style="list-style-type: none"> Introduce second wave and third wave of Village Connections program Begin comprehensive data collection of care coordination program Develop evaluation process for rating services 	FY 2015 FY 2015 FY 2016
	Define and communicate services with members & community		<ul style="list-style-type: none"> Develop a value proposition and a metric to measure value to members 	FY 2015
	Create a supportive and engaging environment that attracts and retains highly-qualified staff	Governance & Compensation Committees	<ul style="list-style-type: none"> Evaluate compensation package for employees Develop board and ED succession plan 	FY 2014 FY 2014

Goal 5	Objective	Responsible Committee	Strategy	Timeline
Become a recognized leader for effective aging in place	Use the WHO Age-Friendly Cities framework to create a community that improves the life-long aging process	Strategic Initiatives	<ul style="list-style-type: none"> Establish the Strategic Initiatives board committee to address advocacy and education issues around housing, transportation, social connection and health 	FY 2014
	Establish Capitol Hill Village as the local community expert on aging-in-place	Strategic Initiatives	<ul style="list-style-type: none"> Develop the educational symposium program to enhance role as community expert on aging in place Communicate regularly in local media outlets on CHV's role in creating an effective aging-in-place model 	FY 2014 FY 2015
	Advocate within the national Village-to-Village Network on increasing the role and function of villages as leaders in aging-in place	Strategic Initiatives	<ul style="list-style-type: none"> Encourage the development of care coordination services in villages Assist in developing a national data collection and strategic research plan among Villages 	FY 2014 FY2015

ⁱ A net increase of 15 social members per year for three years

ⁱⁱ Currently 7%; Capitol Hill Village Catchment area: 42% (defined as non-white)

ⁱⁱⁱ Currently 71 percent

^{iv} Currently 40 percent