Capitol Hill Village

Strategic Plan
2023 – 2028

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Foreword from the Executive Director

As Capitol Hill Village embarks on its fifteenth anniversary year, we are enjoying a strong reputation in our community for being a powerful, valuable, and innovative organization. With that reputation come equally strong expectations that we will continue to deliver on the promises made to those who joined us at the outset and every year since – that we will help older adults embrace and navigate the aging process and help them to stay connected, engaged and as healthy as possible as they live in their home of choice for as long as possible.

The world has changed dramatically in fifteen years. Ride sharing is ubiquitous; video conferencing is nearly as common as telephone calls (which are both less common than email and text); the economy has been shaken to its core, restored, and then shaken again as the result of a once-in-a-century pandemic. CHV – along with our members and volunteers -- has weathered these events and successfully adapted and innovated to meet changing needs. But those changes won't stop, and needs will continue to be great and that requires ambitious plans for the future.

This strategic plan articulates those ambitious plans. It is the result of an impressive year-long, multi-faceted effort by many contributors that took account of global context as well as local interest. (Details on the extensive planning process can be found in Appendix A.) It is intended to serve as a roadmap for the organization's future, communicating its priorities and guiding its programming. It positions CHV as a leader and innovator in the movement to support older adults aging on their own terms, in their own homes, and fight the ageism that makes these tasks more difficult than they should be. I, with the support of CHV's inspiring Board of Directors, embrace the challenges and opportunities presented here and look forward to fulfilling the vision it imagines.

Judy Berman

Acknowledgement:
The work in this document represents the skill and dedication of many people. I'd like to acknowledge Patricia Powers Thomson who designed and led our strategic planning process with skill and enthusiasm, Nancy Deck and the Strategic Planning Committee, including Board Chair Tama Duffy Day, who provided support and leadership, and all of the CHV Board members, staff members, volunteers and community members who contributed their time, energy, and ideas.

Section 1: Introduction

*"We're at a critical time -- the most important moment in a generation -- a time for our
country to renew and revitalize how we support older Americans."*
- LeadingAge

ABOUT CAPITOL HILL VILLAGE

Capitol Hill Village (CHV), a non-profit organization located in Washington, DC, helps older adults navigate and embrace the opportunities of aging. Through the efforts of volunteers, members, partners, and staff we provide a wide-range of services and programs that promote the well-being of all older adults in our community. When the Village was established in 2007, we were the second Village in the country. Now we are the largest of 13 Villages serving the District of Columbia, one of 74 Villages in the DMV, and one of almost 300 Villages nationwide.

AGING TRENDS

The population of older Americans is growing and people are living longer. According to the U.S. Census Bureau's Population Projections, the number of Americans ages 65 and older is projected to nearly double from 52 million in 2018 to 95 million in 2060, and the population of those 65 and older will rise from 16% percent to 23%. In just 20 years, the 85+ population is projected to more than double from 6.6 million in 2019 to 14.4 million in 2040 - a 118% increase. The U.S. Census Bureau projects that the number and share of older Americans will surpass that of children by 2035.

Like the nation, the District of Columbia's 65+ population is also growing - by 29% between 2009 and 2019. Approximately 90,000 of its residents are 65 years and older.   Over 70,000 fall between the ages of 55 and 65. Taken together these groups represent almost a quarter of the city's population and 28% of its voters.

Capitol Hill is also home to an increasing number of older adults. As of 2021, the Hill was home to over 22,000 adults aged 55 or older, representing 21% of the population. There are also approximately 12,636 prospective seniors (45-54 years old) living on the Hill. This number is also expected to grow. Not surprisingly, the demand for CHV's services is increasing, as is our membership. So, too, is the need for a broader array of services to meet the needs of our oldest members, as well as the expectations of younger members, who approach elderhood with a different perspective on the options available. We need to be ready to meet these needs.

The broader world in which we live is also changing, presenting an array of opportunities for CHV. Fueled by a number of factors, including our aging population, technology, and COVID, society is re-thinking how we want to age. This has led to interesting new approaches in healthcare, housing, and elder engagement.

CHV is at an important inflection point in terms of the aging population, the world in which we operate, and the organization's evolution. And we are well-positioned to take advantage of this confluence - to help older adults in our community address both the challenges and opportunities of aging. This Strategic Plan will serve as a roadmap for the organization, communicating our priorities and guiding our programming in the increasingly complex world in which we operate. The plan is intended to guide the work of CHV over the next five years. However, we view it as a living document, one that should be updated as circumstances change and new opportunities emerge.

In the remainder of this plan, we present our planning methodology, mission, vision, core values, strategic goals and objectives, as well as associated performance metrics and programming.

Section 2: Mission, Vision, and Core Values

"My mission in life is not merely to survive, but to thrive."
- Maya Angelou

MISSION
Capitol Hill Village helps older adults navigate and embrace the opportunities of aging. Through the efforts of volunteers, members, partners, and staff we provide a wide-range of services and programs that promote the well-being of all older adults in our community.

VISION
Older adults thriving in a vibrant, inclusive, and age-friendly community.

CHV's "TEN TENETS" (CORE VALUES)
Our Core Values are not just aspirations. They are the foundation of CHV's culture and guide our day-to-day conduct. They will be integrated into our training, staff and board evaluations, and decision-making processes.

- **Excellence.** We are committed to providing excellent, timely, and relevant programs and services. This dedication spurs us to go "above and beyond" on behalf of older adults. We are also focused on outcomes and on helping older adults achieve their goals, however they measure success.
- **Service**. Service is fundamental to who we are. It underpins all of our efforts, including our volunteer programs, member-led activities, and the work of staff. We constantly seek ways to help others and reduce barriers to asking for and receiving help. Members are encouraged to both provide and receive services.
- **Volunteerism**. We believe that our membership is rich in talent, capacity and resourcefulness, and that our commitment to inviting volunteers to help meet the needs of other older adults and the organization is among our greatest strengths.
- **Inclusivity**. We are a member-driven organization that values diversity, equity, and inclusiveness. We actively fight racism and all other forms of inequity. People of all races, genders, cultures, and sexual orientations are welcomed, heard, and play integral roles within the Village.
- **Innovation**. The Village is itself an innovation in how older adults experience their elderhood. We love to learn, to improve, and to innovate. We embrace opportunities and problems alike, and are empowered to take initiative to address them in creative ways.
- **Respect**. We always treat each other with respect and dignity; we reject ageism; we actively listen; we recognize that each of us has different life experiences, interests, and abilities; and we seek to understand and mitigate how power differences impact our relationships and communication.
- **Responsiveness**. Our members can depend on us. We are here when they need us and are responsive to their needs.
- **Teamwork**. Our impact is greatest when we work together toward our common goals. We value collaboration and strive to help each other succeed. We appreciate the many contributions of our members, staff, volunteers, and partners.
- **Kindness:** We show kindness and compassion to ourselves and to others**.** We strive to communicate kindness through every interaction someone has with the Village**.** We are caring individuals that seek to understand others' needs and to provide support with kindness and empathy
- **Joyfulness**: We take joy in our community and our work and strive to bring joy to those we work with. We acknowledge and celebrate each other's success.

Section 3: Strategic Goals and Cross-Cutting Strategies

"Begin with the end."

- Peter Drucker

This *Strategic Plan* is framed around the results we hope to achieve – our strategic goals. Recognizing that there is a continuum of goals, we strove to set ones that are significant, but also within the realm of our control. They fall into two categories:

(1) mission-centric goals focused on the reason we exist, on what we do for older adults (goals 1-4)
(2) enabling goals focused on internal operations and other things that are important to us as an organization (goals 5-8)

We develop these goals by drawing upon the findings of our surveys, focus groups, interviews, trend analysis, and secondary research, supplemented by additional input from the board and staff. During the process, we placed a high priority on asking older adults living on the Hill about their needs and concerns.

All of our strategic goals are consistent with the checklist to the right.

Checklist: Strategic Goals

✓ Consistent with our mission
✓ Flows from our vision
✓ Stakeholder driven
✓ Measurable
✓ Meaningful (not too small)
✓ Realistic (not too big)
✓ Focused on outcomes
✓ Within the realm of our control

STRATEGIC GOALS

Goal 1: To help older adults successfully plan and manage their aging process and attain their elderhood goals
Goal 2: To help older adults stay as physically, mentally, and emotionally healthy as possible
Goal 3: To include older adults of all ability levels in the life and fabric of our community in order to help them stay socially engaged
Goal 4: To help older adults live in their own homes for as long as they wish, and to help them find suitable housing when they want or need to move
Goal 5: To fight racism wherever it shows up in our organization and community
Goal 6: To provide a great volunteer experience for all our volunteers
Goal 7: To increase and diversify our membership so that we better serve our community
Goal 8: To manage the organization successfully and be good stewards of our resources

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CROSS-CUTTING STRATEGIES

Section 4 "drills down" into our strategic goals, providing more specificity on each goal and how we intend to achieve it, but below are several important strategies that are cross-cutting, and will play an important role in helping us achieve ***all*** of our goals:

Strategy: Take advantage of all the talent available to us including members, volunteers, staff, partners, and community resources. In particular, embrace the "volunteer first" model, whereby we provide services whenever possible through volunteers.

Strategy: Provide personalized services driven by individual needs. Leverage proven tools and best practices, but recognize that each individual has unique needs. Per our core values, help older adults achieve their goals, however they measure success.

Strategy: Position CHV to be the "first stop" and "go-to resource" for older adults living on the Hill. As part of this, utilize effective help desk models (virtual and in-person). Establish performance standards, as well as follow-up tracking to ensure requestors' needs were met and to obtain feedback on their experience. Reinforce CHV as a "first stop" and "go-to resource" through marketing materials and campaigns.

Strategy: Provide high-quality, relevant, and accessible programming. Develop programming based on the input of older adults on the Hill, coupled with the input of aging-experts and research. Also develop programming that is "intentional" - that deliberately embeds social opportunities within practical service delivery and in doing so, promotes lasting relationships with CHV and the larger community. Continue to encourage members to develop and lead programming that is important to them. Finally, deliver programming using a mix of in-person and on-line venues.

Strategy: Recognize that there is a *continuum of support* and use the following as a tool to help us determine the best ways to provide services to our members:

CHV Services Continuum

Educate → Help Members Plan → Suggest Providers (through vetted lists and referrals) → Help Manage and Coordinate Care → Deliver Services via Partners → Deliver Services Directly - Staff - Volunteers

For example, one of our goals is to help older adults live in their own homes for as long as they wish. In support of this goal, we may: (1) offer educational programs on homecare, (2) sit down with members and help them plan for their future homecare needs, (3) provide a list of vetted homecare agencies, (4) help coordinate their homecare, (5) make a warm introduction (i.e., referral) to a partner who provides homecare, and/or (6) engage volunteers to provide in-home support directly. This continuum is most useful when we are developing programming.

Strategy: Build strong partnerships with other non-profit organizations, governments, and the private sector. Similarly, support the village model and work collaboratively with other DC Villages. Recognize that through partnerships we can increase the programming available to our members, enhance our visibility and fundraising efforts, share administrative costs, and strengthen our advocacy work.

Strategy: Pro-actively advocate on behalf of older adults living on the Hill, and where appropriate, across the city. Use a combination of approaches, including research, education, and issue-specific advocacy campaigns aligned to the strategic goals highlighted in this plan. Continue to encourage the city to incorporate the needs of older adults in its comprehensive plans and to develop a 10-Year Senior Strategic Plan, as required by law.

Section 4: Strategic Goals with Objectives, Metrics and Programming

We hope CHV is seen by neighbors as an organization that looks like them,
welcomes them as members, and helps them meet their aging goals
                                                            - CHV's Strategic Planning Committee

To add a level of specificity to our *Strategic Plan*, we developed metrics and objectives for each of our Strategic Goals, as well as the programming we plan to implement to achieve them. To communicate this information succinctly, and in a compelling and rationale way, we developed the tables on the following pages (one for each Strategic Goal).

The need is great and this plan is ambitious. The items in the right column are initiatives we hope to pursue during the next 3-5 years. These initiatives will not be pursued all at once, but will be phased. Short descriptions of each can be found in Appendix B. *As is often the case in planning, some of the proposed initiatives fit under multiple goals, as do some of our current programs.*

Initiatives we intend to pursue first are highlighted in **Section 5: The First 12 Months**. Annually, thereafter, as part of our integrated planning and budgeting process, we will determine which initiatives we will roll-out during the upcoming year. In all cases, identifying a "lead" for each initiative will be an essential first step vis-a-vis implementation. More detailed project plans and budgets will also be developed as part of implementation.

Mission-Specific Goals

Goal 1: To help older adults successfully plan and manage their aging process, and attain their elderhood goals

Primary Metric*		
▪ Member ratings of how well CHV achieved this goal (by level of engagement with CHV)		
Objectives	**Current Programming**	**Proposed Initiatives***
Objective 1.1: To help develop customized "plans to thrive"	✓ Get Your Papers in Order Program (GYPIO - stand-alone, as well as module in below)	☐ CHV's Plan to Thrive Program
Objective 1.2: To connect older adults with the services/support they need in accordance with their plan	See "Programming" and "New Initiatives" columns for Goals 2-4	
Objective 1.3: To provide tailored and helpful services/support as needs emerge	✓ Care Services ✓ Volunteer Services ✓ Help Desk at CHT	☐ Replicate Help Desk Model (underway; see also Objective 7.4)
Objective 1.4: To promote a better model for elderhood		☐ The Elderhood Initiative

See Section 6 for more details on our metrics and approach to evaluation   ✓ *= existing programming; ☐ = proposed programming*
See Appendix B for description of proposed initiatives

Goal 2: To help older adults stay as physically, mentally, and emotionally healthy as possible

Primary Metric
▪ Member ratings of how well CHV achieved this goal (by level of engagement with CHV)

Objectives	Current Programming	Proposed Initiatives
Objective 2.1: To provide high-quality health, wellness, and fitness programs	✓ Affinity Groups - Health and Wellness (see Appendix C) ✓ Affinity Groups - Fitness (see Appendix D) ✓ Advocacy Team's Parks & Recreation Initiative	☐ CHV-branded "Heathy Aging" series ☐ Fitness Partnerships ☐ Brain health programming ☐ Expanded Fall-Prevention programming
Objective 2.2: To facilitate access to excellent and affordable healthcare	✓ Care Services ✓ Transportation Services (i.e., to medical appointments) ✓ Advocacy Team's Homecare Initiative (i.e., advocating for a full-range of in-home services, including home healthcare)	☐ Care Services - Intensive Case Management (see also objective 2.4) ☐ Support Group Partnerships with other Villages ☐ Homecare Agency Partnerships (see also Objective 4.2)
Objective 2.3: To help eliminate barriers to good nutrition	✓ Transportation Services (i.e., shopping) ✓ Volunteer Services (i.e., for grocery deliveries)	☐ "Healthy Eating as We Age" program
Objective 2.4: To successfully monitor and coordinate services, and to serve as advocates when needed	✓ Care Services	☐ Care Services - Intensive Case Management (see also objective 2.2) ☐ Volunteer Services – Expanded MedPal Corps (medical buddies and note-takers)
Objective 2.5: To support family caregivers to maintain their own health, as well as those for whom they provide care	✓ Support Group for Caregivers of Individuals with Dementia (in partnership with Iona) ✓ Village Connections (CHV's buddy and check-in program) - Respite Care ✓ LBGTQ Brain Health Support Group	☐ Support Group / Programming for Adults whose Parents are Aging ☐ Male Caregiver Support Group

Goal 3: To include older adults of all ability levels in the life and fabric of our community in order to help them stay socially engaged

Note: This goal is framed around "quality of life," but is also critical for health (physical, mental, and cognitive)

Primary Metric	
▪ Member ratings of how well CHV achieved this goal (by level of engagement with CHV)	

Objectives	Current Programming	Proposed Initiatives
Objective 3.1: To help older adults connect with each other and the larger community	✓ New member on-boarding process ✓ Affinity Groups - Social (see Appendix E)* ✓ Quarterly CHV Happy Hours / Social Gathering (open to all) ✓ Village Connections (buddy/check-in program) ✓ Member Directory	☐ Neighborhood Connections ☐ CHV Singles
Objective 3.2: To provide opportunities to learn and grow	✓ Affinity Groups - Educational (see Appendix F) ✓ CHV Educational Programs (e.g., Village Voices) ✓ Facilitated access to programs offered by other Villages and organizations (weekly email, monthly newsletter, Helpful Village Portal) ✓ Volunteer opportunities via Volunteer Services	
Objective 3.3: To ensure our most vulnerable neighbors are engaged and don't feel alone	✓ Village Connections	☐ Deeper Village Connections
Objective 3.4: To increase the technology skills and comfort level of older adults	✓ One-on-one tech support	☐ Volunteer Services - Tech Training and Support Corps ☐ Tech Partnerships (e.g., Byte Back, IBM)
Objective 3.5: To provide opportunities for older adults to make meaningful contributions to our community	✓ Volunteer opportunities via Volunteer Services ✓ Volunteer opportunities on CHV's Advocacy Team ✓ Volunteer opportunities in the community, publicized by CHV ✓ Affinity Group leadership opportunities	☐ Intergenerational Partnerships (schools and youth organizations)
Objective 3.6: To educate the community about ageism, and be a voice for inclusion of older adults *Note: while this objective is explicit, all of CHV's efforts fight ageism.*	✓ On-going work educating vendors about anti-ageism	☐ Anti-Ageism Campaign

* All of our affinity groups help older adults connect with each other, including those listed on the previous page under Health & Wellness and under Fitness.

Goal 4: To help older adults live in their own homes for as long as they wish, and to help them find suitable housing when they want or need to move

Primary Metric
▪ Member ratings of how well CHV achieved this goal (by level of engagement with CHV)

Objectives	Current Programming	Proposed Initiatives
Objective 4.1: To help ensure homes are safe	✓ Vetted Vendors Program (home inspections) ✓ Vetted Vendors Program (maintenance and repair contractors) ✓ Emergency contact and key services	☐ Enhanced Home Safety Program
Objective 4.2: To help secure high-quality in-home services, including personal care, housekeeping, and home maintenance	✓ Care Services ✓ Volunteer Services ✓ Vetted Vendors Program (e.g., housekeeping, maintenance and repair contractors)	☐ Homecare Agency Partnerships (see also Objective 2.2)
Objective 4.3: To help older adults who are considering moving identify and assess their options	✓ Care Services (e.g., group visits and facility tours)	☐ Expanded CHV Housing Advisory Services ☐ Homeowners Assistance Program
Objective 4.4: To support older adults who are relocating	✓ Care Services ✓ Volunteer Services (e.g., downsizing support)	☐ Elder-Friendly Realtor Working Group ☐ Volunteer Services - Moving Support Team
Objective 4.5: To help ensure Capitol Hill remains a walkable community for older adults	✓ Volunteer Services (snow and leaf removal) ✓ Advocacy Team's Pedestrian Safety Initiative (with DC's Pedestrian Advisory Council)	☐ Neighborhood Assessment Teams (including coordination with city services)
Objective 4.6: To help ensure older adults have access to robust and safe transportation services	✓ Volunteer Services / Rides-on-Request ✓ Advocacy Team's Transportation Initiative ✓ Training on transportation options	
Objective 4.7: To advocate for more senior-friendly housing and homecare services on Capitol Hill	✓ Advocacy Team's Housing & Services Initiative ✓ Advocacy Team's Homecare Initiative ✓ Advocacy Team's Adult Day Health Center initiative	☐ Advocacy Team's Homecare Cooperative Feasibility Study

Enabling and Management Goals

Goal 5: To fight racism wherever it shows up in our organization and community**

Primary Metrics
▪ Member ratings of how well CHV achieved this goal (by level of engagement with CHV) ▪ Staff ratings of how well CHV achieved this goal

Objectives	Current Programming	Proposed Initiatives
Objective 5.1: To build strong relationships within our organization, grounded in trust, respect, and openness where race and racism can be discussed	✓ Reconstituted DEI Committee and continuation/evolution of related efforts ✓ Anti-Racism Working Groups (to be integrated into DEI Committee)	☐ "Living our Core Values" project (see also objective 8.4) ☐ Teambuilding initiatives ☐ Program to honor people engaged in CHV's anti-racism work
Objective 5.2: To increase the anti-racism skills of staff, members, volunteers, and board members	✓ Professional support/coaching for leaders of anti-racism work	☐ Anti-Racism and Cultural Awareness training (see also objective 7.5)
Objective 5.3: To establish effective mechanisms to address occurrences of racism	✓ Reconstituted DEI Committee ✓ Informal support mechanisms for staff of color (someone to talk to)	☐ Racism Grievance Process
Objective 5.4: To develop and integrate anti-racism programming into CHV's portfolio	✓ Study and reading groups on the work of anti-racism artists, scholars, activists, and leaders ✓ District Dialogues	☐ Partnership-building with Black organizations (see also obj. 7.1 and 7.4) ☐ Expanded anti-racism programming
Objective 5.5: To celebrate black history and culture	✓ Hand-dancing	☐ "Celebrating Black History and Culture" project

*****FY23 Priority Activities under this Goal will be determined by the DEI Committee in consultation with Kyla Davis.*

Goal 6: To provide a great volunteer experience for all our volunteers

Primary Metrics		
▪ Average volunteer satisfaction ratings ▪ Other keys metrics from annual volunteer survey		

Objectives	Current Programming	Proposed Initiatives
Objective 6.1: To ensure a positive on-boarding experience for our volunteers	✓ Individualized on-boarding	☐ Volunteer On-Boarding Working Group
Objective 6.2: To match volunteer skills, interests and goals to meaningful opportunities	✓ Systematic process, enabled by technology, to receive requests, identify volunteers, and make assignments ✓ Data collection on types of services provided and volunteer hours; using data to market and to recruit volunteers	☐ Formally collect information on members' professional backgrounds and interests
Objective 6.3: To provide excellent on-going training and support to our volunteers		☐ New volunteer training (in process) ☐ Volunteer survey and enhanced data collection
Objective 6.4: To provide regular opportunities for volunteers to connect with each other and with CHV		☐ Regular volunteer meetings (in process) ☐ Annual one-on-one check-ins with every volunteer in database
Objective 6.5: To ensure our volunteers feel appreciated	✓ Volunteer column in newsletter ✓ Annual Volunteer Awards	☐ Volunteer appreciation happy hours ☐ Volunteer Recognition Program

Note: three new or expanded "volunteer corps" have been proposed and are incorporated elsewhere in this plan: the *MedPal Corps* (objective 2.4), the *Tech Training and Support Corps* (objective 3.4), and the *Moving Support Team* (objective 4.4)

Goal 7: To increase and diversify our membership so that we better serve our community

Per our mission, vision and core value, we strive to be an inclusive organization that welcomes people of all races, genders, cultures, and sexual orientations. Over the next 3-5 years, as we work to diversify our membership, we have decided to focus on two groups, both underrepresented at CHV, African Americans and men.

Primary Metrics
▪ Number of members ▪ Demographic distribution of members by age, ethnicity/race, gender, and income

Objectives	Current Programming	Proposed Initiatives
Objective 7.1: To offer a mix of accessible programming driven by and attractive to a diverse range of audiences	✓ Various health, wellness, fitness, and educational programs and affinity groups ✓ LGBTQ Program	☐ Program advisory groups (PAGs) ☐ Partnership-building with Black organizations (see also objectives 5.4 and 7.4) ☐ Funding stream to develop programming attractive to Black community members ☐ Partnership-building with male-centric organizations
Objective 7.2: To offer a mix of membership levels and fees with a focus on value and affordability	✓ Two-levels (regular and social)	☐ Assessment of membership levels, benefits, and fees (see also objective 8.3)
Objective 7.3: To develop a suite of effective marketing tools (see, also, Goal 8)		☐ Marketing Plan and Products (see also objective 8.3) ☐ Incentive-Based Trusted Recruiters initiative
Objective 7.4: To conduct targeted recruitment of underrepresented communities, leveraging partnerships and events	✓ Help Desk at CHT	☐ Replicate Help Desk Model (see also obj. 1.3) ☐ Additional partnership-building with Black-serving facilities ☐ Partnership-building with Black organizations (see also objectives 5.4 and 7.1) ☐ Partnership-building with male-centric organizations (see also objective 7.1) ☐ Outreach efforts focused only on recruiting volunteers
Objective 7.5: To ensure staff and volunteers have the skills needed to work successfully with people of color and other underrepresented groups		☐ Anti-racism and Cultural Awareness training (see also objective 5.2)
Objective 7.6: To increase the number of black volunteers serving with CHV		☐ Initiative to place black members and volunteers in leadership positions ☐ Initiative to review volunteer recruitment processes

Goal 8: To manage the organization successfully and be good stewards of our resources

Primary Metrics
▪ Staff and Board ratings using *Capacity-Building Organizational Assessment (for High-Performing Nonprofits)*©   ▪ Results of annual audit

Objectives	Proposed Initiatives
Objective 8.1: To ensure an excellent team	☐ "Talent Lifecycle" project ☐ "High-Performing Board" initiative ☐ Volunteer-related projects (see Goal 6)
Objective 8.2: To ensure an effective organizational structure that aligns with our goals while also being flexible and scalable to accommodate growth	☐ Org Structure and Staffing Assessment
Objective 8.3: To ensure strong business processes	☐ "Good to Great" - Fundraising Committee ☐ Project Planning initiative ☐ Marketing Plan and Products (see also objective 7.3) ☐ Aging Research & and Professional Development ☐ Assessment of membership levels, benefits, and fees (see also objective 7.2) ☐ Facilities Plan ☐ DC Villages Shared Management Services (on-going)
Objective 8.4: To ensure a results- and values-driven culture	☐ Enhanced Evaluation Program ☐ "Living our Values" initiative (see also objective 5.1)
Objective 8.5: To successfully manage our finances	☐ Financial Management 3.0

Section 5: Evaluation

The painter goes through states of fullness and evaluation. That is the whole secret of art.
- Pablo Picasso

Overview: Resources for evaluation are often limited for community-based organizations, and CHV is no exception. But being able to assess (and communicate) the impact of our work is essential. Over the past several years, we have benefited from an ongoing partnership with Sharp Insight, who has conducted evaluations for us, as well as built staff capacity. Our evaluation strategy builds from this work. It also balances the need to evaluate the impact of our efforts with the cost of collecting data, and has five components:

- Collecting data for the metrics required in this Strategic Plan, the bulk of which will be collected using a suite of surveys (i.e., member, volunteer, staff and board surveys) – see table below
- Continuing to use output data from Helpful Village
- Continuing to support the DC Village's Taxonomy Project
- Seeking funding / partnerships for longitudinal research
- Including evaluation and corresponding budgets in grant/funding applications when possible

Metrics. The metrics below are the primary ones we will use to assess whether we are achieving our Strategic Goals.   While we have decided to focus our efforts at this level, it does not preclude us from also collecting metrics for our Objectives in the future. As noted above, we will use a suite of surveys to collect data, the most important of which is a member survey - we are a member-driven organization, and the most important assessment of our success is the views of our members.

	Primary Metric	Source
Goals 1-4 *Goal 1*: To help older adults successfully plan and manage their aging process and attain their elderhood goals *Goal 2:* To help older adults stay as physically, mentally, and emotionally healthy as possible *Goal 3*: To include older adults of all ability levels in the life and fabric of our community in order to help them stay socially engaged *Goal 4*: To help older adults live in their own homes for as long as they wish, and to help them find suitable housing when they want or need to move	▪ Member ratings of how well CHV achieved this goal (by level of engagement with CHV)	Member survey
Goal 5: To fight racism wherever it shows up in our organization and community	▪ Member ratings of how well CHV achieved this goal (by level of engagement with CHV) ▪ Staff ratings of how well CHV achieved this goal	Member survey Staff survey
Goal 6: To provide a great volunteer experience for all our volunteers	▪ Average volunteer satisfaction ratings	Volunteer survey
Goal 7: To increase and diversify our membership so that we better serve our community	▪ Number of members ▪ Demographic distribution of members by age, ethnicity/race, gender, and income	Member enrollment data
Goal 8: To manage the organization successfully and be good stewards of our resources	▪ Staff and Board ratings using *Capacity-Building Organizational Assessment (for High-Performing Nonprofits)©* ▪ Results of annual audit	Staff survey Board survey Audit report

Appendix A: Strategic Planning Methodology

"The process is as important as the product"
- Patricia Powers Thomson, CHV Board member

In August 2021, CHV decided it was time to craft a new strategic plan. As part of its work, a Strategic Planning team was established. The team consulted over 240 people through surveys, focus groups, interviews, and working sessions. In addition to the above consultations, the team reviewed an extensive amount of literature and benchmarked other Villages and organizations that support older adults. We used the framework below to guide our efforts, as well as the following data collection techniques:

Member surveys

Sharp Insight developed and conducted a survey soliciting a wide-range of feedback from members. Over 170 of them responded.
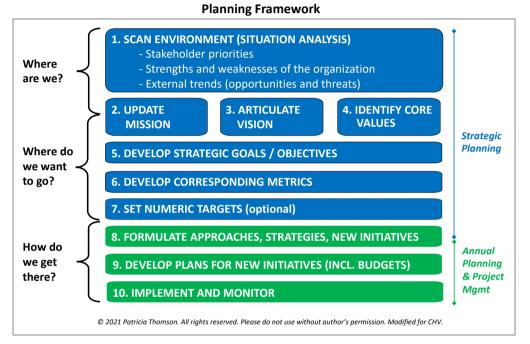
Member listening session

To supplement the survey, all of CHV's members were invited to a "listening" session" facilitated by our Strategic Planning Committee. A sample of members were also selected to participate in the focus group described below.
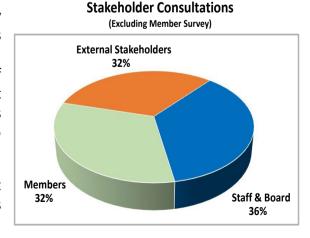
Planning Framework

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Focus groups. We conducted focus groups with key stakeholders to discuss aging, as well as experiences with Capitol Hill Village. These stakeholders included:

- **Members**. This group was randomly selected, including both active and "less active" members, as well as social and regular members.
- **Volunteers**. This group was also comprised of randomly selected volunteers, supplemented by several volunteers recommended by CHV's volunteer coordinator.
- **Prospective Members**. This group was comprised of Capitol Hill residents who are among our target population, but not members of CHV. Board members nominated candidates who were then invited to participate in the focus group.
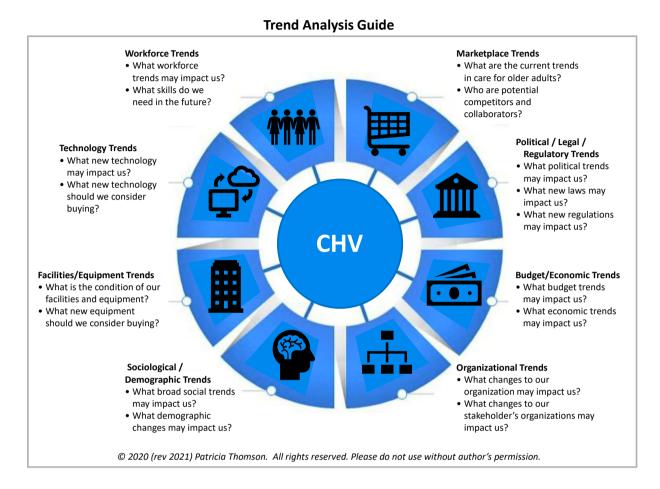
Stakeholder Consultations
(Excluding Member Survey)

External Stakeholders 32%
Members 32%
Staff & Board 36%

Interviews / Discussions. To better understanding the current landscape, as well as future trends, we engaged in discussions with a variety of experts, policymakers, and legislators.

Internal Assessment. Staff and boardmembers conducted an internal assessment of CHV using two tools: the *Capacity-Building Organizational Assessment (for High-Performing Nonprofits)*© and the Nonprofit Leadership Lab's *14 Attributes of a Thriving Nonprofit.* ©

Trend Analysis. To identify external trends that may impact our organization, we undertook a "trends analysis." In addition to clarifying the environment in which we operate, this analysis identified important opportunities, as well as potential threats to our work. We used the framework below to guide our efforts.

Trend Analysis Guide

Workforce Trends
• What workforce trends may impact us?
• What skills do we need in the future?

Marketplace Trends
• What are the current trends in care for older adults?
• Who are potential competitors and collaborators?

Technology Trends
• What new technology may impact us?
• What new technology should we consider buying?

Political / Legal / Regulatory Trends
• What political trends may impact us?
• What new laws may impact us?
• What new regulations may impact us?

Facilities/Equipment Trends
• What is the condition of our facilities and equipment?
• What new equipment should we consider buying?

Budget/Economic Trends
• What budget trends may impact us?
• What economic trends may impact us?

Sociological / Demographic Trends
• What broad social trends may impact us?
• What demographic changes may impact us?

Organizational Trends
• What changes to our organization may impact us?
• What changes to our stakeholder's organizations may impact us?

CHV

Secondary research. Throughout this effort, we drew upon research and literature to inform our planning. Over 100 documents and research studies were reviewed.

Working sessions with staff and boardmembers. We conducted a number of working sessions to address important strategic issues, refine our mission and vision statements, and craft our core values. We also facilitated working sessions to develop strategic goals and objectives, as well as metrics and programming cascading from them.

The results of all of the above work informed our strategic planning process. The outcomes of that process are presented in the remainder of this *Plan*, starting with our mission, vision, and core values, detailed in the next section.

Appendix B

Short Descriptions of Proposed Programming

Capitol Hill Village Strategic Plan (2023-2028) *Approved 11-15-2022*

Appendix B: Short Descriptions of Proposed Programming

The descriptions below are derived from members, staff, and stakeholder input, as well as the literature review conducted during the planning process. These initiatives will not be pursued all at once, but will be phased over the next 3-5 years. Initiatives we intend to pursue first are highlight in *Section 5: The First 12 Months*. Annually, thereafter, as part of our integrated planning and budgeting process, we will determine which of these initiatives we will implement. In all cases, identifying a "lead" for each initiative will be an essential first step vis-a-vis implementation. More detailed project plans and budgets will also be developed as part of implementation.

Goal 1

1. CHV-Branded "Plan to Thrive" Program
There is a significant demand for planning assistance. This specific project involves developing a planning methodology, including a framework and supporting materials. It would also involve training planners (volunteers and/or staff) and piloting the program. As currently envisioned, we would use a modular framework whereby each section (i.e., module) could stand alone. Modules proposed by staff and stakeholders include (in alphabetical order):

- Community and social engagement
- End-of-life
- Finances
- Future housing considerations / option
- Getting papers in order
- Health (physical, cognitive, fitness/mobility)
- Home safety
- Learning & growth (including crafting a "bucket list")
- Legacy
- Nutrition
- Relationships

CHV will offer assistance to new members *at intake* and periodically thereafter. The planning process will be goal-driven with a bias to action (e.g., include accessible resources in the framework so that members know where to go for help as they "implement" their plan).

2. Replicate Help Desk Model
CHV is already running an in-person "help desk" at Capitol Hill Towers Apartments. The Help Desk provides immediate on-site assistance to isolated low-income older adults on a variety of issues, including transportation, technology, and wellness, as well as a links to longer term support through volunteering and membership in CHV, or through connections to DACL programs. As part of this initiative, we hope to replicate the model at other housing complexes and/or wellness centers. We will also investigate repackaging the way members currently request help as a "virtual help desk," continuing to position CHV as their "first stop for help" and "go-to resource."

3. The Elderhood Initiative
This project starts with the premise that society has good models regarding what is required for the young to thrive, as well as for working adults and adults raising families, but not for older adults. Drawing upon existing research and literature (e.g., the "hundred-year-life" model), but also CHV's experience, this project will craft a CHV-branded model for aging. The project team will work in coordination with the "Plan to Thrive" team described above.

4. CHV-Branded Annual "Heathy Aging" Series

CHV already provides a number of health educational programs throughout the year. Through this initiative we will develop them more intentionally, and repackage them under a single umbrella. Conceptually, we will offer regular programs during the year (e.g., managing diabetes, navigating stairs, cataract awareness). These programs may be coupled with an annual 2-day capstone seminar. The annual seminar would be centered on important or emerging aging developments (e.g., research and advances re: dementia; research and advances re: mobility; end-of-life planning; Medicare and Medicaid reform). In addition to providing important information to older adults in our community, this seminar series could raise funds through sponsorships and, as a branded recurring series, support CHV marketing.

5. Fitness Partnerships

Through this project CHV will strengthen its gym partnerships to include:

- senior memberships ($50/month, with some free memberships for low-income members)
- an increase in senior-friendly classes (gentle yoga, senior balance, senior weight-training)
- donated space for CHV fitness affinity groups (during times when fitness rooms are not being used - usually mid-morning and mid-afternoon)

In exchange, CHV will help market all of the above, as well as include the gym as an in-kind sponsor in CHV material.

6. Brain Health Programming

Maintaining cognitive health is a top priority for seniors, including CHV members. In this initiative we will research, develop, and pilot programs designed to promote brain health, with a focus specifically on cognitive health, reducing cognitive impairment, and addressing cognitive decline. Additional areas of brain health (e.g., emotional or motor function) may also be addressed over time.

7. Expanded Fall-Prevention Programming

Falls are the leading cause of fatal and non-fatal injuries for seniors. Through this program we will organize existing programs, as well as research, develop, and pilot additional fall-prevention programs. There are a number of evidenced-based fall-prevention programs that we can leverage including those documented by the National Council of Aging (https://www.ncoa.org/article/evidence-based-falls-prevention-programs).

8. Care Services - Intensive Case Management Service

Building on the solid program currently in place, this initiative will expand and enhance Care Services. The program's focus will remain helping members navigate and manage their healthcare and housing, and meet their basic needs, but with an increased focus on cases that need more intensive management. The initiative will also update the process by which we identify providers for our "Providers Lists," as well as expand the number of lists we maintain (to include geriatricians, rehab services, home healthcare, and hospice care). Finally, as part of this initiative, Care Services will also explore increasing the advisory services it provides vis-a-vis housing, nutrition, and end-of-life services.

9. Support Groups Partnership with Other Villages

Support groups are a powerful and low-cost way to support members and their partners who are facing serious or chronic health issues. Through this project, we will work with other Villages to collect input on interests and needs, and then pilot several issue-specific support groups. Ideas for groups include: diabetes, hearing loss, and hand mobility. This initiative also includes developing training for support group facilitators.

10. Homecare Agency Partnerships

After years of steady increase, there is an exploding demand for homecare services, and commiserate shortages. Through strategic partnership with providers, not only will we increase access for our members, but we will also enhance the services we "offer." In this project we will continue to experiment with different service models, as well as increase the number of agencies with whom we partner, and on whom we can rely. Our initial focus will be partnering with homecare agencies. Eventually, other possible partnerships may include: partnerships with geriatric

practices, housecall programs, respite care, rehabilitation, adult day health centers, hospice care, and care coordinators. Working with Johns Hopkins to bring a geriatrics center to DC is another strategic partnering opportunity (they are ranked 5th nationwide in geriatrics; none of DC's medical institutions are nationally ranked).

11. Healthy Eating as We Age
This program will be two-pronged: we will partner with organizations that deliver fresh produce to seniors and we will host educational programs focused on nutritious eating (e.g., cooking demos, "food as community" programs, nutrients and vitamin requirements, five food groups and calorie intake as you age).

12. Volunteer Services – Expanded MedPal Corps
Drawing from the experiences of a number of other villages, we will expand our MedPal team comprised of trained volunteers who support members during doctor's appointments. Specifically, these volunteers will help brainstorm questions prior to appointments, accompany members to appointment, and take notes if needed.

13. Support Group for Adults with Aging Parents
The Board is interested in providing some "pipeline" programming for younger adults living on the Hill. This initiative will support adults with aging parents, including those who are experiencing cognitive decline. The group will benefit participants and their parents. It will also introduce a new generation to CHV and serve as a pipeline for both volunteers and future members.

14. Male Caregiver Support Group
Men caregivers often have weak support networks and are less likely to seek assistance. Support groups are a good way to help male caregivers. Through this project, we will work with other Villages to determine interest/demand for such a group and then pilot it. We will also leverage the facilitator training designed as part of the larger "Support Groups Partnership with Other Villages" described above.

15. CHV Neighborhood Connections
CHV's member survey, research, and experience with COVID all highlighted the importance of programs that facilitate connections and reduce isolation. CHV's "special sauce" is the connections it can facilitate among older adults. This initiative will facilitate neighborhood-level networking by dividing the Hill into smaller neighborhoods and facilitating interaction at that level. Examples of activities include happy hours, dinner clubs, and block parties, as well as neighbor check-ins/phone chains. "Neighborhood captains" will be essential to help coordinate activities, so the initiative is premised on finding *volunteers* to serve in this capacity. We may end up with some neighborhood segments being more successful than others.

16. CHV Singles
As part of this initiative, CHV will support adults who are looking to date through events focused on how to use dating apps; conversations about best places in DC to meet other singles; and speakers on current dating scams. If there is an interest, this initiative might also include occasional cross-village events focused on singles, including mixers themed or catered to people who enjoy similar things (i.e., people who like sports, film, cooking, etc.).

17. **Deeper Village Connections**
Through Village Connections, volunteers visit regularly with an assigned member to see how they are doing, and to help with tasks like reading mail, going shopping, or reducing household clutter. Building on the success of this program and lessons-learned during COVID, we will develop ways to strengthen and refine the program to ensure it meets the needs of current and future members.

18. Volunteer Services - Tech Training and Support Corp
Technology offers powerful venues for people to connect with each other and the world. CHV already connects volunteers with members who need tech support. Building from this, we will establish a more formal *Tech Training and Support Corps*. Smart homes, smart TVs, and smart phones; laptops, tablets and printers - no matter the tech, this group of skilled volunteers will provide hands-on technical assistance to members. They may also conduct seminars on emerging technology relevant to older adults. Examples include medical technology, "password management" practices, and smart home technology.

19. Tech Partnerships
As part of the program, we will pursue long-term relationships with tech firms (e.g., IBM). We hope that these relationships will provide expertise to our Volunteer Services Tech Training and Support Corp, as well as sponsorships, pro bono services, and equipment donations. We'll also work with existing tech training and support non-profits (e.g., Byte Back) to make more support resources available to members.

20. Intergenerational Initiative
Well-designed intergenerational programs have a positive impact on everyone involved. They improve the well-being of older adults and decrease the stigma and discrimination associated with aging, while also supporting youth development. Through this initiative, CHV will seek partnerships and joint programming with schools and youth organizations.

21. Anti-Ageism Campaign
All of CHV's work counters stereotyping and discrimination based on age. This on-going campaign will explicitly fight anti-ageism through a number of tracks:
   – Anti-ageism educational partnerships with local business organizations (CHAMPS, Capitol Hill Business Improvement District, Eastern Market Main Street, Barracks Row Main Street)
   – Intergenerational Partnerships with schools and youth organizations (see previous description)
   – Anti-ageism training modules as part of our volunteer training
   – An anti-ageism "tip sheet" (distributed at all events and in all CHV training)
   – An anti-ageism birthday card competition (possibly as part of the CHV Gala)

Goal 4

22. Enhanced Home Safety Program
Building upon our existing program, CHV will investigate ways to better assist home owners as they assess their home's safety and make necessary modifications. The program will leverage professional organizations and existing programs with the expertise required to do this work successfully.

(10.) Homecare Agency Partnerships
After years of steady increase, there is an exploding demand for homecare services, and commiserate shortages. Through strategic partnership with providers, not only will we increase access for our members, but we will also enhance the services we "offer." In this project we will continue to experiment with different service models, as well as increase the number of agencies with whom we partner, and on whom we can rely. Our initial focus will be partnering with homecare agencies. Eventually, other possible partnerships may include: partnerships with geriatric practices, housecall programs, respite care, rehabilitation, adult day health centers, hospice care, and care coordinators. Working with Johns Hopkins to bring a geriatrics center to DC is another strategic partnering opportunity (they are ranked 5th nationwide in geriatrics; none of DC's medical institutions are nationally ranked).

23. Expanded CHV Housing Advisory Services
Through this program, CHV will help members who are considering moving assess their options. Specific services will include:
  – Working with our new "Plan to Thrive" team to develop a framework for helping members develop a "housing plan" (see Goal 1)
  – Tracking and sharing information on senior-suitable housing in the area (e.g., houses, condos, apartments)
  – Tracking and sharing information on "housing with care" options in the area (assisted living, skilled nursing communities, LifePlan / Continuing Care Communities)
  – Working with CHV's Enhanced Home Safety Program (see above)
  – Working with our Advocacy Team as they advocate for more elder-friendly housing on the Hill / Hill East
  – Helping create and then working with an Elder-Friendly Realtor Working Group (see below)

24. Homeowners Assistance Program
In this initiative, we will provide advice, resources, and referrals to senior homeowners who may be forced to move if their home isn't made safe and/or senior-suitable. As part of this effort, we will also assess the feasibility of developing a revolving fund to support senior homeowners who need financial assistance to keep their home and/or maintain its value.

25. Elder-Friendly Realtor Working Group
As part of this initiative, we will invite local realtors to create a working group with the goal of increasing the skills and knowledge needed to better serve senior homebuyers and sellers. This group will also help us develop tools / checklists that our members can use as they think about and prepare to move. Finally, through this group we will promote relevant existing certifications, including: the National Association of Realtors' *Seniors Real Estate Specialist* (SRES)® and the National Association of Home Builders' *Certified Aging-in-Place Specialist (CAPS).* We will also consider the option of establishing a CHV "elder-friendly realtor" designation.

26. Volunteer Services - Moving Support Team
When a member is moving, this team will be available to help them prepare for and make the move. A volunteer from this team will help coordinate and bring to bear an array of CHV resources. Examples of support may include: sharing checklists developed by the *Elder-Friendly Realtor Working Group* (see above), finding movers or contractors through our vetted vendors program, providing downsizing resources (e.g., on how to sell/donate furniture), or arranging for volunteers to help paint or make minor repairs.

27. Neighborhood Assessment Teams

 Living in a walkable community is very important to our members. In this program, volunteers will conduct periodic block-by-block inspections to identify concerns with sidewalks, curbs, lighting, etc. They will then coordinate with city services to fix the problems identified. Age-Friendly's "Block-by-Block Walk" is a possible resource /partner.

28. Advocacy Team's Homecare Cooperative Feasibility Study

Building on our extensive work advocating in support of homecare services in the District, we will work with the Long Term Care Coalition to assess the feasibility of establishing a Cooperative Homecare Agency (or CO-OP). Our focus will be a homecare agency that provides: (1) homemaker and companion care (e.g., meal planning and preparation, laundry, cleaning, shopping and errands, some mobility assistance, and medication reminders); (2) personal care (usually all of the above plus help bathing, dressing, toileting, feeding, and incontinence care); and (3) Home Health Aides - including those with "Medication Aide credentials," which permit the administration of some medication.

Goal 5

Note: Our Diversity, Equity, and Inclusion Committee (DEI) has been reconstituted and is in the process of refining its responsibilities, structure and procedures. This group will oversee implementation of Strategic Goal 5 and relevant parts of Strategic Goal 7.

29. "Living our Core Values" project
As part of this project, we will integrate our core values into our: hiring, on-boarding, and assessment procedures (for staff, volunteers, members, and boardmembers). Particularly important for Strategic Goal 5 are our values of inclusiveness, respect, and teamwork.

30. Teambuilding initiatives
There is extensive research on how to build strong teams. In this initiative, we will tap into that research with a particular focus on team-building approaches that build/sustain trust, respect, and openness, which are so important to anti-racism work.

31. Program to honor people engaged in CHV's anti-racism work
We will establish a program to actively honor the people engaged in our anti-racism work, especially those who play leadership roles. Possible approaches include awards, public acknowledgement, and "appreciation days."

32. Anti-racism and Cultural Awareness training
Education and skill-building is at the core of our anti-racism strategy. Through this initiative, we will develop and deliver anti-racism and cultural awareness training with a heavy dose of practical scenario-based exercises. Training will be developed for staff, volunteers, members, and boardmembers. A number of good resources already exists, which we will research and leverage when developing our program. Of particular importance will be modules designed to ensure staff and volunteers have the skills needed to work successfully with people of color and other underrepresented groups.   In addition to a formal training, we will also utilize less formal learning opportunities to educate stakeholders about anti-racism. Example include:
  – producing a semi-annual report celebrating our anti-racism efforts, but also sharing actual instances of racism and how to mitigate them
  – re-enforcing anti-racism messages at affinity group leader meetings, volunteer gatherings, and board meetings
  – writing about racism, examples of microaggressions, and other relevant topics in our monthly newsletter

33. Racism Grievance Process
As part of this initiative, we will develop a structured process for staff, volunteers, and members to report instances of racism, and for the organization to address them.

34. Partnership-building with Black organizations
One of the best ways to fight racism is to integrate anti-racism programming into CHV's portfolio in partnership with black community organizations. To help do this, we will build strong, long-term, and mutually beneficial relationships with Black-run organizations, including churches, businesses, nonprofits, residences, sororities, and fraternities.

35. Expanded anti-racism programming
Building from our successful District Dialogues, we hope to expand our programming related to educating the white community about the urgency of anti-racism activities. Ideas include: events on racial conflict (modern and historic) and how it impacts the lives of seniors today; programs on researching family history; programs for members to connect anti-racism to their experiences and to deploy anti-racist practices; and anti-racism educational events such as public lectures, salon dinners, member gatherings. In all cases, particular attention should be paid to ensuring racially diverse presenters.

36. "Celebrating Black History and Culture" project
To ensure our anti-racism strategy includes a includes a pro-Black and not just anti-racism perspective, we will develop programming to celebrate black history and culture, including be programming during Black History Month.

37. Volunteer On-Boarding Working Group
As part of this initiative, we will convene a small working group to document, assess, and enhance our on-boarding process for volunteers. Items to be considered include: a packet for prospective volunteers, as well as standards for following-up with them (e.g., within 3 days); an on-boarding checklist; and 3-month check-ins (by staff or volunteer "buddies") to ensure new volunteers are having a good experience. This group will also work with the team developing new volunteer training (see project below).

38. Formally collect information on members' professional backgrounds and interests
To help better connect members to volunteer opportunities, we will collect information on their professional backgrounds and interests.

39. New volunteer training
Drawing on best-practices in volunteer management, this training will help new volunteers get to know CHV and our volunteer program, as well as signal that we are a professional well-run organization. General topics will include: CHV's structure, programs, and services; what volunteers do; how they do it (tools, processes, resources); and how to make referrals to CHV staff if they have concerns about a client. We will use a mix of digital, virtual, and in-person approaches.

40. Volunteer survey and enhanced data collection
Using the draft survey developed as part of this strategic planning effort, we will create and administer an annual on-line volunteer survey. We will also continue to collect feedback from clients using an emailed link an easy-to-complete form (e.g., type of service, timeliness, service quality, overall satisfaction). And we will continue to code and count all volunteer hours. Finally, we will begin to estimate/capture hours for recurring work (e.g., affinity group leaders, board members, Village Connections).

41. Regular volunteer meetings
Through this initiative, we will host volunteer meetings at least quarterly, during which we will offer opportunities to learn new information and/or skills, and to connect with other volunteers.

42. Annual one-on-one check-ins
Every year we will reach-out to every volunteer in our database to ensure they are satisfied with their volunteer experience, update their areas of interest, update their contact information, and clean-up our active/inactive rosters.

43. Volunteer appreciation happy hours
We will host volunteer happy hours periodically during the year.

44. Volunteer Recognition Program
Volunteer are an essential part of CHV. To celebrate and thank them, we will develop a more formal recognition program. In addition to our Annual Volunteer Awards, we will thank members through service pins, letters of appreciation, "shout-out" in our monthly newsletter, and gifts of branded CHV apparel.

45. Program advisory groups (PAGs)
One of the best ways to ensure our programming is attractive to a diverse range of audiences is to solicit the engagement of underrepresented groups. In this initiative we will create two Program Advisory Groups - one for Black community members and one for men - to help us identify programs of particular interest and importance to these constituents. We also hope to recruit from these groups or their networks Black and male members who are interested in developing / leading programming.

(34.) Partnership-building with Black organizations
Another way to ensure our programming is attractive to a diverse range of audiences is to develop it in partnership with diverse organizations. To this end, we will build strong, long-term, and mutually beneficial relationships with Black-run organizations (e.g., churches, businesses, nonprofits, residences, sororities, and fraternities).

46. Funding stream to develop programming attractive to Black community members
Through this initiative, we will conduct targeted fundraising to help us develop and implement programming attractive to Black community members.

47. Partnership-building with male-centric organizations
Recognizing that men are underrepresented in our membership, we will also implement an initiative to develop partnerships with male-centric organizations. Examples include: Masons, Lions Clubs, veteran organizations, and fraternities.

48. Assessment of membership levels, benefits, and fees
CHV has much to offer the community and we do not want cost to be a barrier to membership. Further, we want to encourage engagement with, and membership in, CHV as early in someone's retirement as possible. Building from the Membership Committee's on-going work, in this project we will assess our current membership categories (member and social member) and consider new models (e.g., 3-4 levels of membership), as well as associated benefits and fees.

49. Marketing Plan and Products
As part of this initiative, we will work with professionals (ideally pro bono) to craft and implement a tailored set of marketing strategies, supported by an updated suite of marketing products. Strategies should be developed for seniors on the Hill who are not yet members; underrepresented groups; potential funders; and 50-60 year-olds who are starting to plan for their elderhood. At a minimum, we also plan to update/develop the following products:
  - A card / flyer that can be delivered to every home on the Hill
  - A one-page FAQs document similar to the one used by the Advocacy Team
  - Customized flyers for underrepresented groups (e.g., men and Black community members)
  - A "prospective volunteer" packet
  - A redesigned website, building on the good work already done to improve the site
  - Regular, but managed, email communications (e.g., one "Weekly Digest" email per week, one "Newsletter" email per month)
Finally, as part of this initiative we will consider the full range of ideas offered by participants of the Focus Group For Prospective Members.

50. Incentive-Based "Trusted Recruiters" initiative
We will utilize Black recruiters who are known and trusted by their communities to market the benefits of CHV. Recognizing effective recruiting takes time and energy, we will provide incentives like gift cards and donated services in appreciation for their efforts.

(2.) Replicate Help Desk Model
CHV is already running an in-person "help desk" at Capitol Hill Towers Apartments. The Help Desk provides immediate on-site assistance to isolated low-income older adults on a variety of issues, including transportation, technology, and wellness, as well as a links to longer term support through volunteering and membership in CHV, or

through connections to DACL programs. As part of this initiative, we hope to replicate the model at other housing complexes and/or wellness centers. We will also investigate repackaging the way members currently request help as a "virtual help desk," continuing to position CHV as their "first stop for help" and "go-to resource."

51. Additional Partnership-Building with Black-Serving facilities
In addition to offering our Help Desk model, we will partner with Black serving residential communities and wellness centers to develop and deliver programming jointly designed to meet the needs of their clients.

52. Outreach efforts focused only on recruiting volunteers
Volunteers are a key part of the CHV team. And volunteering is an important pipeline to membership - indeed, our Volunteer Program is a great way to engage neighbors who don't think they "need" CHV, or aren't yet ready to become members. Through this initiative, we will update our volunteer recruitment strategy, focusing on outreach efforts exclusively for volunteers.

(32.) Anti-racism and Cultural Awareness training
Through this initiative, we will develop and deliver anti-racism and cultural awareness training with a heavy dose of practical scenario-based exercises. Training will be developed for staff, volunteers, members, and board members. A number of good resources already exists, which we will research and leverage when developing our program. Of particular importance will be modules designed to ensure staff and volunteers have the skills needed to work successfully with people of color and other underrepresented groups.   In addition to formal training, we will also utilize less formal learning opportunities to educate stakeholders about anti-racism. Example include:
- producing a semi-annual report celebrating our anti-racism efforts, but also sharing actual instances of racism and how to mitigate them
- re-enforcing anti-racism messages at affinity group leader meetings, volunteer gathering, board meetings
- periodic "anti-racism tips" in monthly newsletter

53. Initiative to place Black members and volunteers in leadership positions
As part of this initiative, we will work to recruit Black members and volunteers into leadership positions. Having more Black members and volunteers in leadership roles (e.g., board, affinity groups, committees, events) will help us recruit more black volunteers, and in turn, more black members. It will also lead to a better understanding of community needs and better programming. Finally, it will support our efforts to ensure our staff and board are diverse.

54. Initiative to review volunteer recruitment processes
As noted above, our Volunteer Program is an important pipeline to membership. In this initiative, we will assess our volunteering pathways, policies and opportunities, and remove any obstacles that may prevent Black community members from volunteering.

Goal 8

The initiatives described below are derived, primarily, from the internal assessments conducted by staff and the Board as part of this strategic planning effort. Two tools were used: *the Capacity-Building Organizational Assessment (for High-Performing Nonprofits)*[©] and the Nonprofit Leadership Lab's *14 Attributes of a Thriving Nonprofit*.[©] As these assessments showed, there is a lot to celebrate in terms of CHV's management, but as is the case with any organization, some areas where we can improve.

55. "Talent Lifecycle" project
 In this project we will assess and strengthen our training & development, staff assessment, and incentives processes. Through this initiative, we will also refine our recruiting process to proactively seek a diverse pool of highly-qualified candidates, and to ensure a welcoming and inclusive on-boarding experience.

56. "High-Performing Board" initiative
Building on the work that is already underway, we will strengthen our Board training and assessment processes. Leveraging efforts that are already underway, we will also proactively seek a diverse pool of highly-qualified Board candidates, and ensure a welcoming and inclusive on-boarding experience.

57. Org Structure Assessment
We are at an important inflection point in terms of the aging population, the world in which we operate, and our organization's evolution. To take advantage of this confluence, we need to be sure we are structured and staffed to achieve our goals, while being flexible and scalable to accommodate growth. In this project we will assess our structure and re-organize as needed. The project will include: organizational units, staffing and job descriptions, reporting relationships, and coordination mechanisms.

58. Financial Management 3.0
We will continue to refine our financial reporting procedures to facilitate decision-making, support oversight, and align our finances with this strategic plan. Building from the strong work done by our Finance Team over the past several years, we will pay particular attention to monthly financial reporting, bi-monthly Board reviews, 501C3 compliance, annual auditing, and grants management.

59. "Good to Great" - Fundraising Committee
We have had good success fundraising over the past several years, and it has had a notable impact on the services we have been able to provide. We will continue our efforts to ensure *diverse* funding (e.g., member dues, donations/gifts, grants, contracts, and endowment interest). We will also continue to expand our efforts to increase revenue, with a preference for larger, flexible, and up-front funding (vs. reimbursable funding). This work will be orchestrated through a revamped Fundraising Committee comprised of boardmembers, a dedicated staff member, and a fundraising consultant. The Committee's first deliverable will be a fundraising strategy.

60. Project Planning initiative
As part of our integrated planning and budgeting process, every year we will determine which of the initiatives in this plan we will implement. Moreover, it is likely that emerging needs, coupled with CHV's entrepreneurial culture, will lead to additional initiatives not anticipated in this Strategic Plan. In either case, identifying a "lead" and developing a project plan will be essential first steps vis-a-vis implementation. Through this project we will institutionalize project planning as a core process, adopt standard templates, and provide project planning training.

(49.) Marketing Plan and Products

As part of this initiative, we will work with professionals (ideally pro bono) to craft and implement a tailored set of marketing strategies, supported by an updated suite of marketing products. Strategies should be developed for seniors on the Hill who are not yet members; underrepresented groups; potential funders; and 50-60 year-olds who are starting to plan for their elderhood. At a minimum, we also plan to update/develop the following products:

- A card / flyer that can be delivered to every home on the Hill
- A one-page FAQs document similar to the one used by the Advocacy Team
- Customized flyers for underrepresented groups (e.g., men and Black community members)
- A "prospective volunteer" packet
- A redesigned website, building on the good work already done to improve the site
- Regular, but managed, email communications (e.g., one "Weekly Digest" email per week, one "Newsletter" email per month)

61. Aging Research & and Professional Development

A learning organization is one that is skilled at acquiring knowledge and using it to improve. CHV has always been such an organization. Indeed, one of our core values is innovation - embracing opportunities and problems alike, and empowering people to address them in creative ways. We will build on this culture to establish a formal mechanism whereby staff stay up-to-date on aging research, share what they learn, and, where appropriate, incorporate it into our programming.

(48). Assessment of Membership Levels, Benefits, and Fees

CHV has much to offer the community and we do not want cost to be a barrier to membership. Further, we want to encourage engagement with, and membership in, CHV as early in someone's retirement as possible. Building from the Membership Committee's on-going work, in this project we will assess our current membership categories (member and social member) and consider new models (e.g., 3-4 levels of membership), as well as associated benefits and fees.

62. Facilities Plan

Given the likely growth in CHV's membership, programming, and staff, our current office space may not meet our future needs. As part of "facilities planning" we will project our future needs, and identify options for meeting them. At a minimum, we will consider: office space, including private space; meeting space; enabling technology; and a place for members to gather informally. This work will feed into a multi-year Capital Campaign.

63. DC Villages Shared Management Services (on-going)

As part of this initiative, we will continue to explore ways of sharing resources across DC Villages (e.g., grant-writers, CFOs, evaluators). By sharing resources, we leverage economies of scale, reduce redundancy, and enable new villages to mobilize more quickly.

64. Enhanced Evaluation Program

Resources for evaluation are often limited for community-based organizations, and CHV is no exception. But being able to assess (and communicate) the impact of our work is essential. As detailed in Section 6, we will continue to balance the need to evaluate the impact of our efforts with the cost of collecting data. To these ends, our re-vamped evaluation program will have the following five components:

- Collecting data for the metrics required in this Strategic Plan, the bulk of which will be collected using a suite of surveys (i.e., member, volunteer, staff and board surveys)
- Continuing to use output data from Helpful Village
- Continuing to support the DC Village's Taxonomy Project
- Seeking funding / partnerships for longitudinal research
- Including evaluation and corresponding budgets in grant/funding applications when possible

(29.) "Living our Core Values" project

As part of this project, we will integrate our core values into our: hiring, on-boarding, and assessment procedures (for staff, volunteers, members, and boardmembers).

Appendix C
Health and Wellness
Affinity Groups and Support Groups

Capitol Hill Village hosts many member- or volunteer-led programs. Depending on their purpose they are usually called "affinity groups" or "support groups." Members are encouraged to start their own groups in response to emerging interests and needs. These groups often serve multiple goals - for example, a fitness group that also helps participants stay socially engaged. We have organized them in the next several Appendices to reflect their primary purpose.

- **Meditation.** This one-hour weekly meditation session begins with a discussion of the role of meditation in our everyday lives followed by 10 minutes of guided meditation and 20 minutes of silent "mindfulness meditation."

- **Support Group for Caregivers of Individuals with Dementia**. Capitol Hill Village and Iona Senior Services partner to offer this support group for individuals who are caregiving for a family member or friend with memory loss. The group is led by a professional from Iona Senior Services. The group meets monthly

- **Parkinson's Support Group**. The Parkinson`s Support Group helps individuals with Parkinson`s share knowledge, discuss challenges, and provide support to each other.

- **Reiki**. Reiki, which means "Universal Life Energy" in Japanese, is non-invasive therapy that promotes the body's own healing ability with benefits including reduction of chronic and acute pain, reduction of stress and anxiety, and increased energy and mental clarity. Fifteen-minute sessions provided by a CHV Member and Reiki Master are available weekly.

- **LBGTQ Brain Health Support Group.** This group welcome anyone in the LGBTQ+ community impacted by dementia (caregivers, self, partner past or current, or anyone close to you). It meets biweekly.

Appendix D
Fitness Affinity Groups

- **Bicycle Club.** Members of all different bicycling levels explore new trails and get exercise while enjoying the outdoors and getting to know other members.

- **Easy Strollers**. The Strollers meet weekly at Eastern Market for a gentle walk. This stroll is suitable for persons of all abilities, as the group's pace is slow and there are many benches available for resting. Those who wish to walk at a faster pace are encouraged to do so.

- **Hand Dancing**. Hand dancing is a form of dance that was created by D.C. dancers in the 1950's. It is recognizable by its continuous hand connection as well as smooth fluid footwork. In 1999 it was formally recognized as the city's official dance. This group meets monthly for an afternoon of hand dancing, snacks & fun.

- **Petanque.** Petanque is a French game similar to bocce, played by teams of up to three. This group meets weekly to play. Instruction and equipment are provided to new players who are always welcome.

- **Qigong.** This gentle, powerful Chinese movement exercise (pronounced chee-gong) can be done by most people who can stand for 20 minutes at a time. The group meets two times a week at the courtyard at St. Mark's Church.

- **Tai Chi.** The Tai Chi group practices once a month. Beginners are particularly invited to the first half hour for instruction on the six basic exercises that prepare for the full Tai Chi forms. In the second half hour, students go through the series of postures in the Tai Chi form. Beginners and experienced students will benefit from both half hours.

- **Urban Walkers**. Each month participants explore parts of the DMV on foot. Walks range from 3 to 6 miles with at least one break. On average, the group keeps a 25-30 minute mile-pace.

- **Chair Yoga**. This twice per week class is designed for ALL skill levels and does not require any prior experience.

Appendix E
Social Affinity Groups

- **Cinephiles**. The Cinephiles see contemporary films on their first release. The group selects five or six films each month. Members see at least two of the films on their own and then come together to discuss them.

- **Dining/Restaurant.** Members can meet other members over lunch or dinner at local restaurants while seated at tables of no more than six via occasional "Dinner Parties" or "Lunch Parties."

- **Games and Puzzles.** Twice a month this group meets at the game store Labyrinth to play a variety of card and board games. No experience is necessary as Labyrinth owner Kathleen and her colleagues teach members both individual and group games for an afternoon of brain stretching and bantering fun.

- **Mahjong**. Mahjong originated in China and is similar to the Western card game rummy. It is a game of skill, strategy, and calculation, and it involves a certain degree of chance. This group meets weekly to play together. An Intro to Mahjong session is also offered periodically at a local venue.

- **Potluck Dinners**. Potluck dinners are scheduled by this affinity group about four times a year at the home of a member. Participants bring an appetizer, an entrée, a side dish, dessert, or a bottle of wine to share in a relaxed social setting. Note: This group was suspended at the start of the COVID pandemic and has not yet been restarted.

- **Purls of Wisdom**. This group is for folks with some experience knitting, crocheting, needlepointing, etc. Members enjoy good conversation while working on a favorite yarn project usually at a host member's home.

- **Wyze Guyz**. This CHV men's group organizes monthly meetings on topics of special interest to men (e.g., health, cognition, nutrition, and politics); hosts a lunch once a month at a local restaurant for chat and camaraderie; and organizes field trips (such as to the Goddard Space center). CHV women are of course welcome at all Wyze Guyz events and meetings.

Appendix F
Educational and Cultural Affinity Groups

- **History/Biography Book Group**. This group read and discuss a selection of American and world history and biography books selected semi-annually in an e-mail poll of its participants. The group meets monthly. Most participants are lifetime readers who express the pleasure and satisfaction they feel in expanding their knowledge and understanding of national and world affairs.

- **Literary Club**. This club group reads one work a month and then meets for discussion. Books, chosen by members at a planning meeting usually held in the spring, include fiction and non-fiction, both classic and contemporary, with an occasional evening for poetry or a play.

- **NGA Meet, Walk, View, Eat**. Once a month in Spring and Fall this group gather to visit the National Gallery of Art. The group walks to and from the Gallery, and meets for lunch after the visit.

- **Memoirs.** Stories, as told by the people who lived them, reflect a unique piece of history and are treasured by the storytellers, their families and maybe others for generations to come. This group connects people who are interested in creating a memoir with people who have already done so. Topics include: getting started, obstacles to revealing memories, writing habits and staying motivated, and major themes and threads creating your story.

- **Opera Society**. The CHV Opera Society is composed of members who love opera or who wish to learn more about it. The group meets monthly to expand participants' knowledge of opera, discuss upcoming events of interest, and enjoy the company of others who also like this glorious art form. Presentations usually focus on performances by opera companies in the Washington area, with descriptions of the history, synopsis, and music of each opera.

- **Poetry Readers**. This group meets regularly to share and discuss poems. Each attendee may (but is not required to) bring a poem to read, followed by a lively conversation about what we think the poem means, as well as more exploration of the topics the poems touch on.

- **Theater Group**. By purchasing tickets through the Village for resale to members, and thus, taking advantage of group discounts, the CHV Theater Group enjoys DC's rich, vibrant theater scene at more affordable prices. A volunteer selection committee meets early each summer to choose seven or so plays for the upcoming season. Theater lovers also have a chance to socialize at discussions that take place after the show at a member's home or a restaurant.

- **Travel**. The CHV Travel Group consists of Hill Villagers who have collectively traveled the world as guides, researchers, temporary foreign residents, and, of course, intrepid tourists. An interest in exploring the world, a passion for adventure and discovery, and a desire to stretch their comfort zones are a few of the motivating factors for the group. Each month, the group meets to share travel experiences, information, and resources, or to take a day-trip (or an occasional overnight) trip.

- **CHV and Second Wind Chorus**. Join a group of CHV members who meet every Tuesday to raise their voices in song with the Second Wind Chorus, under the able direction of a master musician/chorister. Participants learn new music and to enjoy the sound of their own voices. The bar for participation is not high, just a love of singing together. While the ability to read music is a plus, it`s not required, and there are no auditions. The group meets weekly in the Spring and Fall.

- **Anti-Racism Reading Groups.** The Antiracism Reading Group are made up of members, volunteers, and community members who seek to become more informed about race, racism, white fragility, social justice and white supremacy.