## Swarthmore Senior Citizens Association



## Strategic Plan

October 9, 2024

## Mission:

To promote the well-being of seniors, as well as others in the community, by providing a welcoming environment for social interaction, learning opportunities, and exploring resources through a variety of activities and programs.

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#### **SWOT** Assessment

The Board completed a Strengths, Weaknesses, Opportunities, & Threats analysis in August 2024. They also analyzed the results of a survey that Swarthmore Senior Citizens completed in Spring 2024.

STRENGTHS	WEAKNESSES
<ul> <li>Regular Programming (Lunch and Learns, Web Wanderings, Friday Friends)</li> <li>Newsletter/Digital Communication</li> <li>Community (informal)</li> <li>Reputation, presence, and influence in the community</li> <li>Borough Grant</li> <li>PAC Center – location &amp; support</li> <li>Administrator</li> <li>People &amp; core of volunteers</li> <li>Financial Assets (Principal Fund)</li> <li>People will ask when asked</li> <li>Board Leadership &amp; Competency</li> </ul>	<ul> <li>Fewer participants than there could be</li> <li>"Senior" label is a tough sell and not inclusive</li> <li>Small volunteer base</li> <li>Lack of Kitchen facilities</li> <li>Cruise Director Mentality</li> <li>Digital Communication</li> <li>Outreach to current and recruitment of new members</li> <li>No access to a van</li> <li>Communication (outside of weekly newsletter)</li> <li>Lack structure for members creating programs at their own direction</li> <li>Lack clear expectations for Board Members and Volunteers</li> </ul>

#### **OPPORTUNITIES**

- Input from members
- Grow volunteer structure and base
- Transportation of members
- Increase involvement by interest with more targeted emails
- Collaborate with other groups, churches, COSA
- Collaborate with Swarthmore
   College, Wallingford
   Swarthmore School District, &
   Widener
- Integrate new members
- Expand newsletter efficiency
- Volunteer Opportunities
- Increase dues and donations including clear annual appeal

#### **THREATS**

- Other opportunities & organizations, competing senior programs
- PAC/SUMC relationship
- Borough Grant
- Financial Market downturn
- Decrease in volunteer mentality
- Board succession and planning for the future
- 110 Construction and parking changes

#### Survey Analysis:

#### Demographics:

Question	What we learned	Action Items
Are you a member of SSCA?	<ul><li>25% non-members</li><li>Reach of newsletter</li></ul>	<ul> <li>Convert regular attendees to members</li> <li>Convert members to regular attendees</li> </ul>
Do you get our e-newsletter?	• Most do	<ul><li>Improve efficiency of newsletter</li><li>Expand Communications beyond newsletter</li></ul>
What is your age?	• 12 people under 65	Future seniors might be interested
What is your gender?	Mostly woman	Increase programming for men with walks, sports, outreach to male seniors, existing cadres of senior men (Hobbs coffee group), and leverage men in the community
Do you live alone?	Mostly not	Encourage women to bring their husbands and plan some couples themed events
Do you drive?	Most drive	Build driver's pool based on differentiation of ride type
Are you retired or working?	Most retired, some working	<ul> <li>Evening and weekend programs</li> <li>Inclusion of those who don't work, but aren't retired</li> </ul>
Are you interested in evening or weekend activities?	• 51% interested in evening/weekend activities	<ul> <li>Add evening and weekend programming</li> <li>Ad hoc programs or committee</li> </ul>

#### **Satisfaction With Current Programs:**

Question	What we learned	Action Items
Have you attended & how satisfied are you with Web Wanderings?	<ul><li>Consistent attendance</li><li>High satisfaction</li></ul>	Addition of structured discussion
Have you attended & how satisfied are you with Lunch & Learn?	• 1/3 of respondents don't come	<ul> <li>Increase the caliber of speakers</li> <li>Increase food</li> <li>Rough counts of attendance</li> <li>Coordinate food with speaker</li> </ul>
Have you attended & how satisfied are you with Friday Friends?	<ul><li>Informal and non committal</li><li>Argumentative conversation</li></ul>	<ul> <li>Can we provide it?</li> <li>Should it be better supervised?</li> <li>Logistics: separate tables to foster better conversation</li> </ul>
Have you attended & how satisfied are you with Games?	• Small groups, but works for them	<ul><li>Offer teaching of games</li><li>Need Coordinators</li><li>Only advertise games open to new players</li></ul>

#### **Interest In New Activities:**

Question	What we learned	Action Items
Are you interested in attending local theater?	Some interest	Need volunteers
Are you interested in walking on campus or in the Ville?	Higher level of interest	Need volunteers
Are you interested in rotating dinners or lunches?	Some interest	• Need volunteers
Are you interested in taking the train to Philly?	• Good amount of interest	<ul><li>Need volunteers</li><li>Well designed, well communicated trips</li></ul>
Are you interested in lunch in the Dining Hall?	Some interest	<ul><li>Need volunteers</li><li>Casual meetups</li></ul>
Are you interested in service activities for the Swarthmore Library, Swarthmore First Place, Chester Eastside, or PAC Center?	<ul> <li>Low interest overall</li> <li>Many people already volunteer with other groups</li> </ul>	<ul> <li>Collaborate with other groups</li> <li>Provide information to new members if requested</li> </ul>
Are you interested in learning about SSCA volunteer opportunities?	• Low interest, but many unsure	<ul> <li>Involve those who are interested</li> <li>Educate members on volunteer needs</li> <li>Offer volunteer opportunities with clear expectations</li> </ul>

#### Goals and Objectives

From the assessment done and information gathered, the Board identified the following Goals and Objectives.

GOALS	OBJECTIVES
Increase Member Engagement	Maximize Participation
Increase Member Engagement	Encourage Volunteerism and Ownership
Increase Member Engagement	Integrate New Members
Improve Board Functionality	Articulate clear expectations of board members
Improve Board Functionality	Focus on organization and planning
Improve Board Functionality	Define goals and assess outcomes
Improve Board Functionality	Plan for succession and actively recruit new board members
Improve Board Functionality	Create structure and expectations for volunteers
Enhance Communications Strategy	Assess current weekly electronic newsletter
Enhance Communications Strategy	Expand both digital and non-digital communications

#### **Actions and Outcomes**

## Goal: Increase Member Engagement Objective: Maximize Participation

What to do?	Who is doing it?	Measurable Result
Increase programming for men with walks, sports, outreach to male seniors, existing cadres of senior men (Hobbs coffee group), and leverage men in the community	Dan and Bill	Increase in male members and male participation  # of men invited to attend our activities
Encourage women to bring their husbands and plan some couples themed events	The Board	Well Attended Couples Events  # of husbands, and couples, invited to attend events
Add evening and weekend programming	?	# of evening, and of weekend, activities presented
Web Wanderings: Add structured discussion to session	Dan Snyder and Sheila Bell	# of sessions with structured discussion
Lunch & Learn: Increase the caliber of speaker	Stephanie McDonough	Compare programming year over year and analyze speakers  Keep a rough count of
Lunch & Learn: increase food & enhance décor, coordinate food with speaker	Shirley Mitrovich	attendance each week  Add food column to lunch and learn planning document Keep a rough count of attendance each week Create plan for what kind of meal is planned for each week of the month (e.g., week 1: soup & salad)
Friday Friends: evaluate program to ensure it fits with our mission	Mary Payne	Track attendance and return rate
Friday Friends: improve conversations by separating tables	? Page 7	Have we separated the tables?

What to do?	Who is doing it?	Measurable Result
Games: recruit coordinators to better communicate with games groups	Stephanie McDonough (with assistance from PAC)	Does each game group have a coordinator who has provided contact information to Stephanie?
Games: offer teaching of games played	Games Coordinators	Have teaching sessions of popular games been offered?
Games: only advertise groups that are open to drop in players	Jo Ellis	Are the groups in the newsletter open to drop in players?
Restart SSCA Travels	Stephanie McDonough and Dan Snyder	How many trips were taken and to where? How many people traveled?

## Goal: Increase Member Engagement Objective: Encourage Input, Volunteerism and Ownership

What to do?	Who is doing it?	Measurable Result
Advertise Potential     Groups (attending local     theater, walking groups,     rotating dinners and     lunches, lunch in the     dining hall, book club)	Sheila Bell [need at least one more leader]	How many new groups have formed and what events have they held? What is the participation level?
Lunch & Learn: monthly evaluations	Dan Snyder	Have we done evaluations? What have we learned?
Host events to educate membership on volunteer opportunities and recruit volunteers	Board of Directors	# of attempts to educate membership How many volunteers were recruited?
• Recruit a Volunteer Coordinator	Dan Snyder, Nancy Daniel and Stephanie McDonough	Do we have a volunteer coordinator?
Advertise Volunteer     Opportunities for new program creation,     welcoming committee,     hospitality, tech help desk, newsletter backup,     driver pool, and general help	Board of Directors and Sheila (new program creation), Nancy & Stephanie (welcoming committee), Shirley (hospitality), Dan (tech help desk), Jo (newsletter backup), and Stephanie (driver pool and general help)	Do we have volunteers actively and meaningfully participating in SSCA?  Have the needs identified to the left been filled with new volunteers?

## Goal: Increase Member Engagement Objective: Integrate New Members

What to do?	Who is doing it?	Measurable Result
Create Welcoming     Committee of members     willing to serve as short     term buddies to new     members to encourage     them to come to events	Nancy Daniel, Stephanie McDonough, Volunteer Coordinator	Do we have buddies available? How many members have been given a buddy? Is it helping to bring new members to events?
Greeters for lunch and learn and other big events to welcome newcomers	Nancy Daniel, Shirley Mitrovich	Do we have greeters at each lunch and learn?

## Goal: Improve Board Functionality Objective: Articulate Clear Expectations of Board Members

What to do?	Who is doing it?	Measurable Result
• Create list of Board Expectations (see Appendix A)	Board of Directors	Do all Board Members meet expectations? Are the expectations given to potential new board members?

## Goal: Improve Board Functionality Objective: Focus on organization and planning

What to do?	Who is doing it?	Measurable Result
Change Board Meetings format to create more time for discussion	Dan Snyder	Are committee reports distributed before the meeting? Are Board Meetings more productive? What are the end times of meetings compared to previous months?
Submit Committee     reports by Friday at     noon prior to Board     Meeting	Committee Chairs, Officers, Stephanie McDonough	Are reports being submitted on time?

Take-Aways provided at the end of the meeting and shortly after	Dan Snyder, Stephanie McDonough	Are take-aways distributed by the day after the meeting? Are the take-aways helpful to members? Have we improved follow through on projects/tasks?
Create Program Calendar	Stephanie McDonough, Dan Snyder, plus Board and Committee Chairs	Do we have a program calendar? Is it being used?

## Goal: Improve Board Functionality Objective: Define Goals and Assess Outcomes

What to do?	Who is doing it?	Measurable Result
Create and adopt a strategic plan	Dan Snyder, Jo Ellis, Stephanie McDonough, and Board of Directors	Have we adopted a strategic plan?
Measure attendance via shared Google Doc	Board, Committee Chairs, Coordinators, and Volunteers	Are we recording attendance at events?
Board Member to collect data on completion of action items in strategic plan, and present at Dec & May Board Meeting	Mary Payne	Was data collected and presented?

## Goal: Improve Board Functionality Objective: Plan for succession and actively recruit new board members

What to do?	Who is doing it?	Measurable Result
• Assign roles to new Board Members	Dan Snyder and Board of Directors	Do new board members know their roles?
Assess practicality of current Board Members Terms and By-laws; take action if needed	Dan Snyder and Bill Scarborough	Was action by the Board needed and taken?
Increase Board Member     Pool by increasing     volunteer base	Board of Directors, Stephanie McDonough, with support from program coordinators	Have we established a defined volunteer base?

What to do?	Who is doing it?	Measurable Result
Review and reimagine     Advisory Council	Board of Directors, plus Advisory Council	Do advisory council members have a clear role in SSCA?
• Increase Current Board Size (8) by 3 or 4 people	Board of Directors	Did Board membership increase to 11 or 12?
Identify Board Members     with aspirations to hold     Officer positions	Board of Directors	Have we outlined succession plans for key positions?

## Goal: Improve Board Functionality Objective: Create structure and expectations for volunteers

What to do?	Who is doing it?	Measurable Result
• Create list of Volunteer Expectations (see Appendix B)	Board of Directors	Did we create such a list? Are the expectations given to volunteers? Do all volunteers meet expectations?
Build structure of creating and managing volunteer roles	Volunteer Coordinator	What is the structure?
Utilize Volunteer Form     (Appendix C) to     standardize volunteer     requests	Stephanie McDonough	Was the form created? Has it been used?

## Goal: Enhance Communications Strategy Objective: Assess current weekly newsletter

What to do?	Who is doing it?	Measurable Result
Solicit feedback from current members on weekly newsletter	Jo Ellis and Dan Snyder	How was feedback collected and used?
• Exclude events that are not open to members dropping in to participate	Jo Ellis	Are all of the advertised events open to drop ins?
Provide clear instructions for events	Jo Ellis	Are registration instructions clear?

What to do?	Who is doing it?	Measurable Result
that require pre-registration		
Add more     entertainment to     current newsletter,     especially original work     from local creators	Jo Ellis	Have we increased inclusion of entertaining (rather than informative) work in the newsletter (especially original work from local creators)?
Create License     agreement for use of     copyrighted material	Bill Scarborough	Was the agreement created? If so, is s it being used?

## Goal: Enhance Communications Strategy Objective: Expand both digital and non digital communications

What to do?	Who is doing it?	Measurable Result
Increase the use of the Swarthmorean both free options and paid ads	Jo Ellis and Sheila Bell	How often did SSCA appear in The Swarthmorean?
Partner with PAC     Center and Swarthmore     Towne Center	?	Were we included in their communications?
Encourage the Board and Volunteers to personally communicate with individuals	Board of Directors	Are Board Members actively engaging with members with the goal of promoting SSCA?
• Freshen website	Dan Snyder, Jo Ellis	Is our website up to date and useful?
Create and deploy general fliers around town	?	Did we create a flier and deploy it?
Identify and provide non-digital communications for those in need	?	Did we create and provide non-digital communications?

What to do?	Who is doing it?	Measurable Result
Update trifold membership flier	?	Have we updated our flier?
Establish relationships     with local churches,     start by creating     contact list	Mary Payne?	Was the contact list created? Which churches have we started to deepen relationships with?
Build relationship with Swarthmore College	Mary Payne	Which college personnel have we talked to? What specific outcomes have we achieved?
Develop list of Real     Estate Agents to give     SSCA information for     seniors moving in	Stephanie McDonough	Has the list been developed? Have we used it to more effectively make ourselves known to seniors moving in?
• Identify cadres of seniors to advertise to (Strath Haven Condos, Plush Mills)	?	What new cadres of seniors have we identified? How have we reached out to them?

#### **Future Planning Initiatives**

- 1. Create a vision statement and codify our values
- 2. Address the ambiance in The Centennial Room
- 3. Other volunteers needed:
  - a. Online communications: update FaceBook page at least weekly, with content from newsletter and Board members; could be a high-school student doing "community service" or possibly a college student
  - b. Online public resource: update the directory of organizations in Swarthmore
  - c. Graphic artist:
    - i. Facilitate our re-visiting our logo do we want to change it per Kel Kyle's suggestion? If so, provide designs from which we could choose
    - ii. Freshen the appearance of our written communications, and make it consistent across all our outlets
      - 1. hard copy (fliers, posters, business cards) and online communications (newsletter, website, FaceBook, email)
      - 2. typefaces
      - 3. colors
  - d. Hard-copy communications: re-design the tri-fold flier, and create a format for future posters announcing special events. Include QR codes for convenient access to website, donating, newsletter signup.

#### Appendix A. Board Expectations

- 1. Duty of Obedience: Board members are responsible to assure that the Board and the organization follow the organization's laws, bylaws and policies
- 2. Duty of Loyalty: Board members must act in good faith and in the best interests of the SSCA at all times
- 3. Duty of Care: Do what is necessary to understand the issues. Keep abreast of what SSCA is doing (e.g., check emails and texts daily, respond as promptly as feasible, read meeting agendas and prepare as appropriate, such as by reviewing documents shared with the Board).

#### 4. Re self-dealing:

- a) Board members should not seek personal gain or act in such a way that there is an appearance of impropriety.
- a) Board members should always disclose any conflicts of interest and recuse themselves from the specific activity or vote, if appropriate.
- 2. Board members are expected to make an annual financial contribution to SSCA that is as generous as their means allow. The contribution should be made in the first quarter of the year, and is in addition to their membership dues.
- 3. Regularly attend monthly Board meetings at the PAC Center, prepared to actively participate
- 4. Alert President to agenda items in advance of meetings
- 5. Attend activities
- 6. Lead at least one program or activity
- 7. Read, and (where appropriate) respond to email promptly (usually by the day after it was received).
- 8. Engage and include members (especially new members) to foster community
- 9. Represent SSCA well in the community

#### Appendix B. Volunteer Expectations

- 1. Dependable
- 2. Friendly
- 3. Collaborative
- 4. Honorable
- 5. Provide Contact Information
- 6. Coordinators will send information for Newsletter to Editor
- 7. Coordinators will give feedback about programs, attendance and photos
- 8. Your role will be defined with clear tasks and timelines.
- 9. You can request financial program support from the Board if needed.

#### Appendix C. Volunteer Forms



## Swarthmore Senior Citizens Association

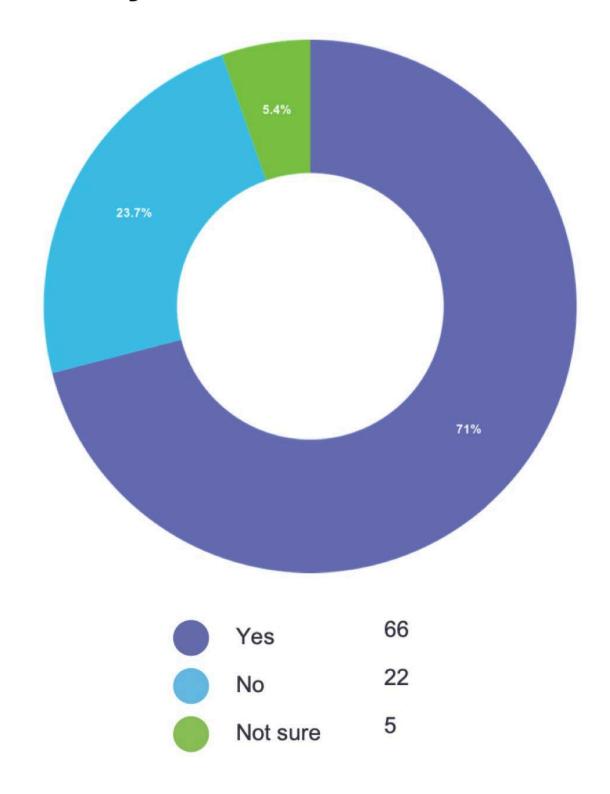
Volunteer Role:		
Responsibilities:		
Time Required:		
Duration of role:		
Board Contact:		
Name	Email	Cell

#### Appendix D. Survey Results

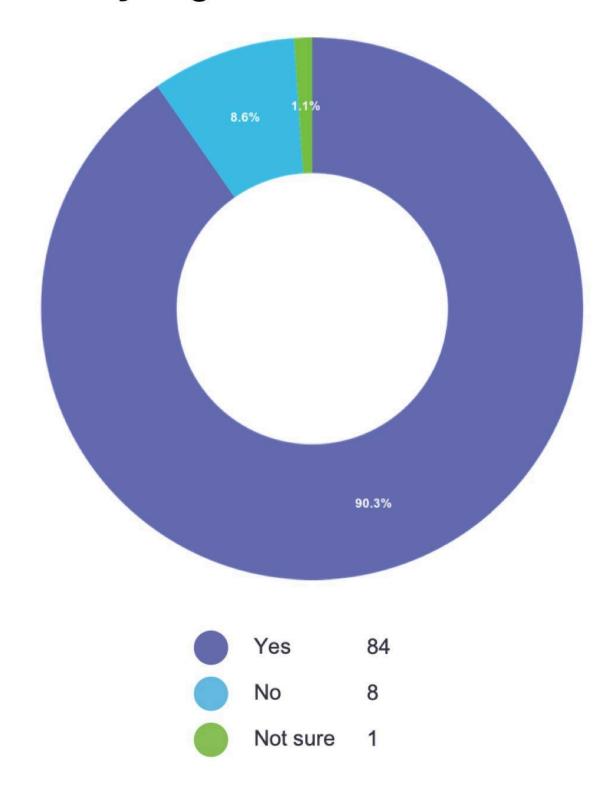
### Survey Results, 2024



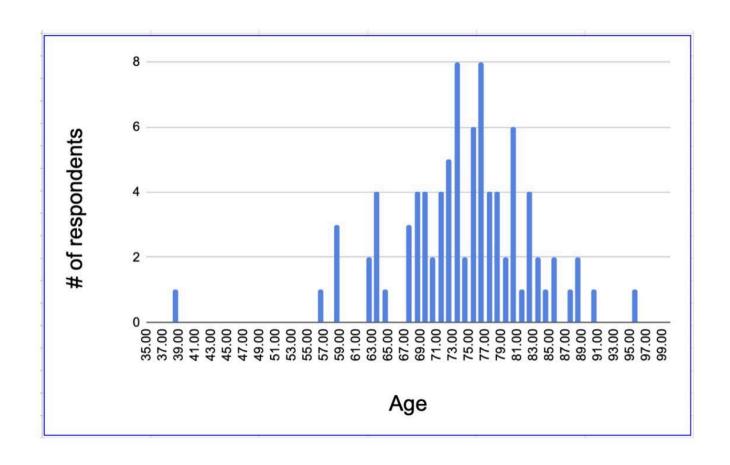
## 1. Are you a member of SSCA?



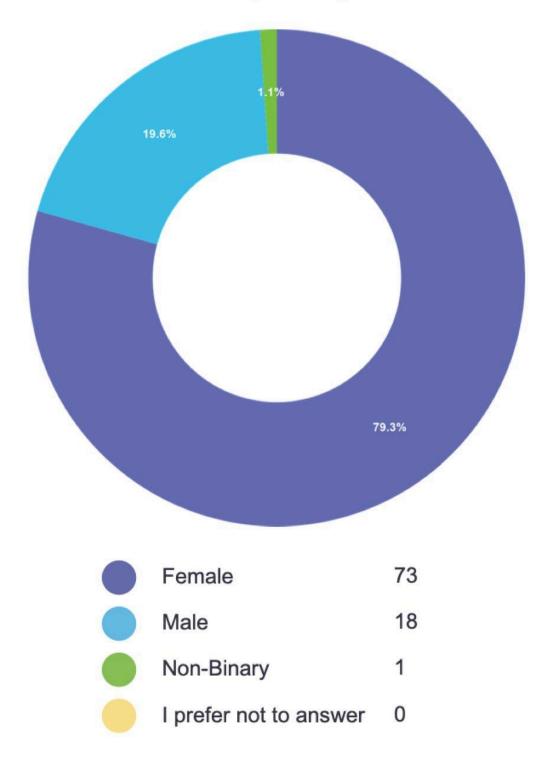
### 2. Do you get our e-newsletter?



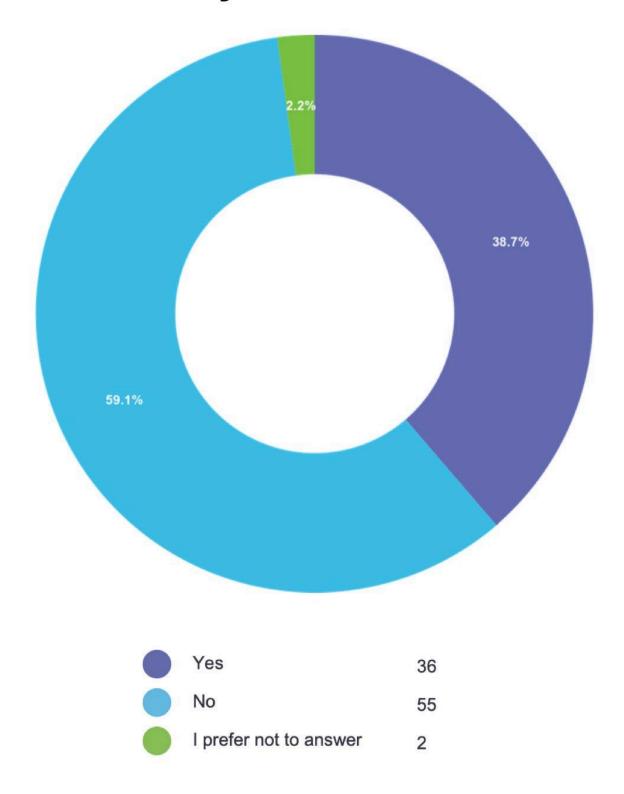
### 3. What is your age?



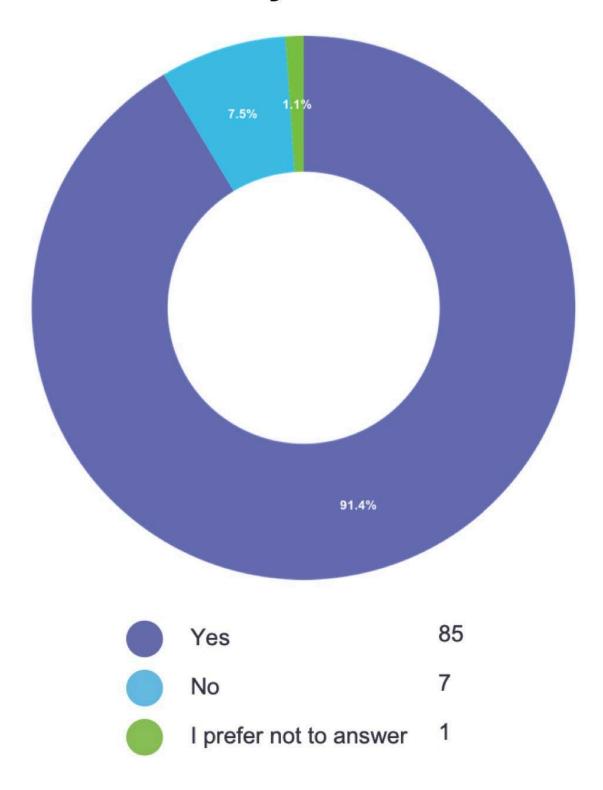
## 4. What is your gender?



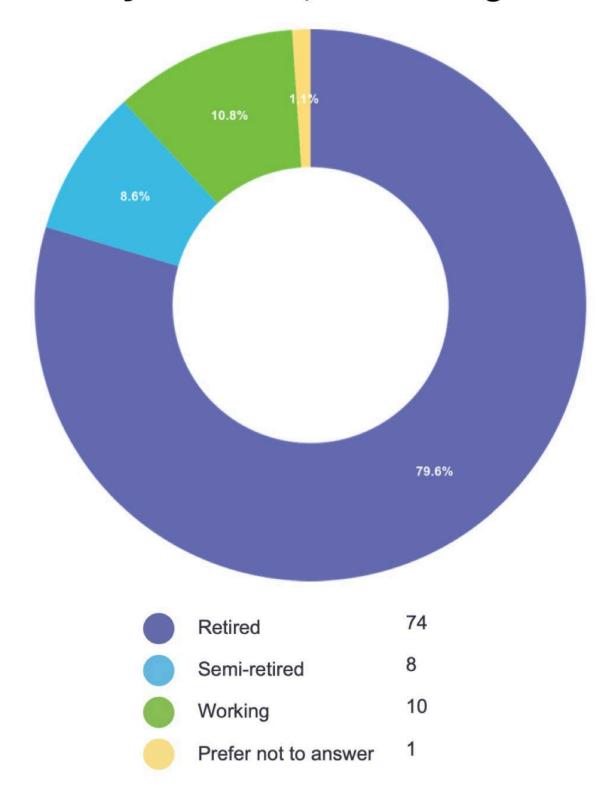
## 5. Do you live alone?



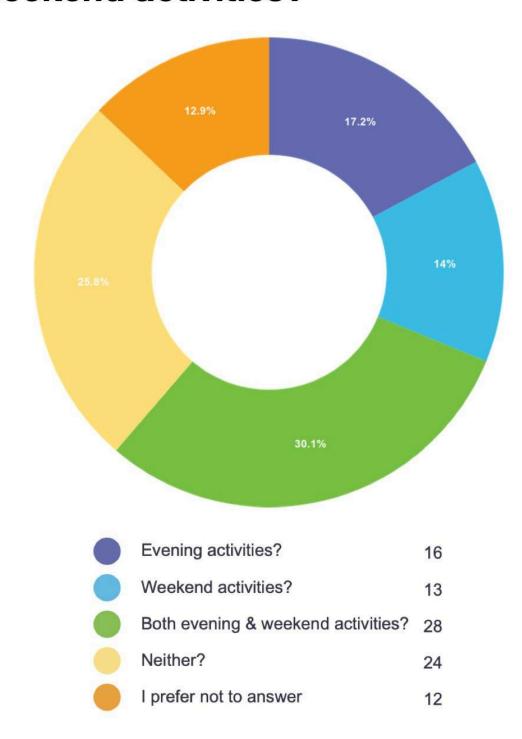
## 6. Do you drive?



## 7. Are you retired, or working?



## 8. Are you interested in evening or weekend activities?



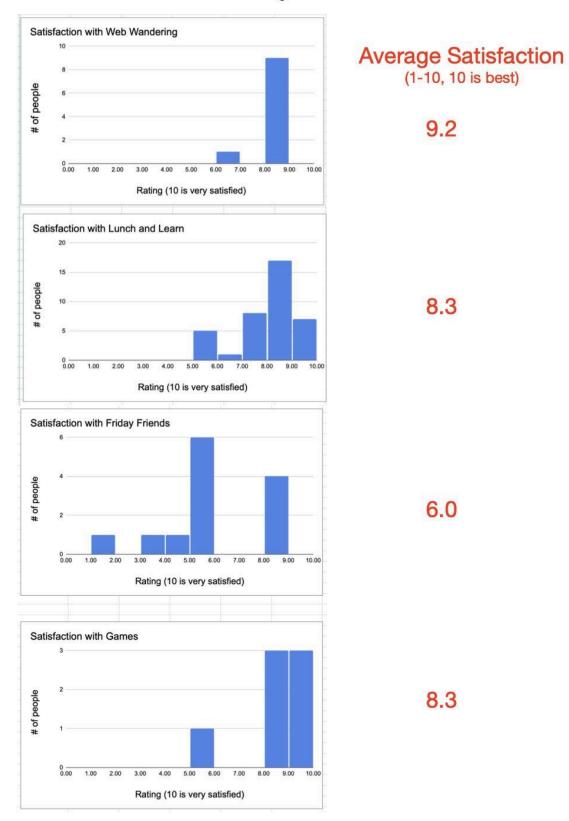
### **Participation In Our Current Programs**

Have you attended? \*

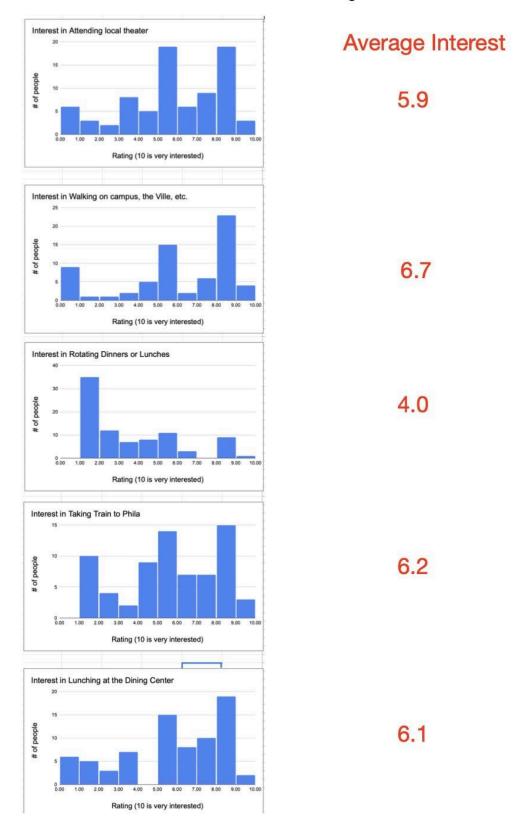


<sup>\*</sup> Reasons for not attending are shown in Appendix.

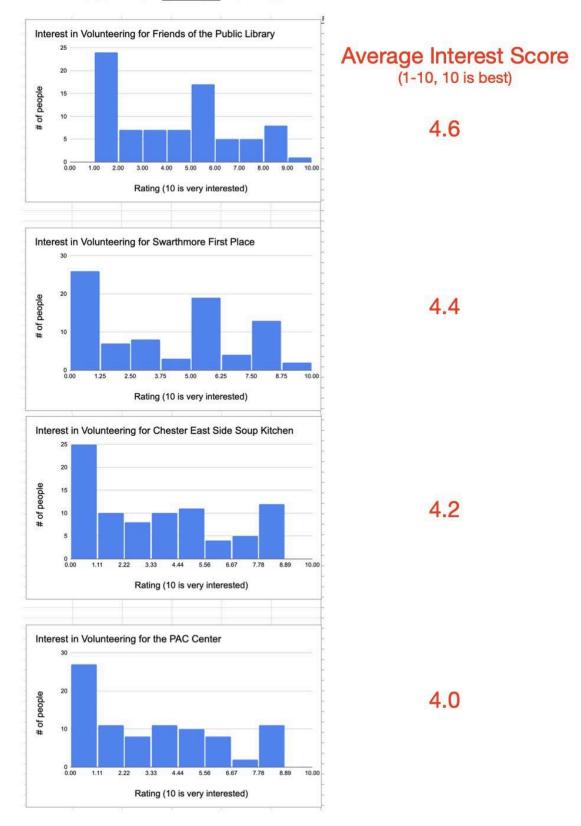
#### **Details of SATISFACTION in Current Programs**



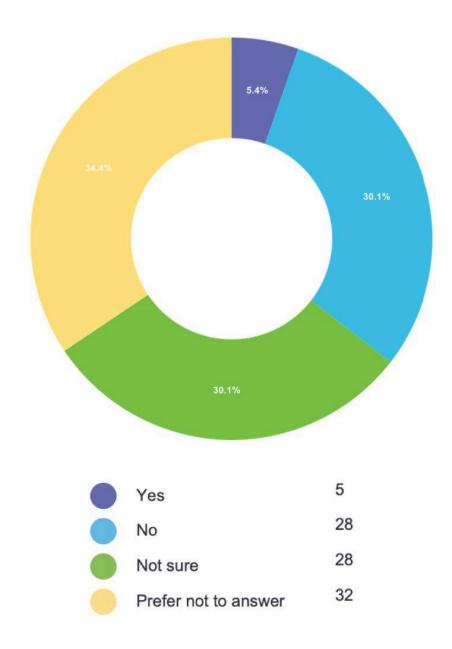
#### Interest in new SOCIAL Programs



#### Interest in new SERVICE Activities



# 32. Are you interested in learning about SSCA volunteer opportunities?



#### Note:

The detailed individual responses to the following questions were included in our analysis. However those responses are not included in this public document because they could disclose confidential information:

- ➤What new social activities do you suggest?
- ➤ What new <u>services</u> activities do you suggest?
- ➤ Please provide your contact information if you'd like us to follow up with you.
- Why did you not participate in certain of our current programs?