



Strategic Plan 2018-2023

Board Approved

Mission Statement

The mission of SourcePoint is to help our community set a course to live well after 55.

Vision

A community where every person 55 and over is empowered to live life to the fullest.

Purpose

The purpose of this document is to establish high level primary goals and key strategies for SourcePoint over the next 5 years, which will guide management in developing appropriate tactics and action plans.

Goals

Scope:

Through identification, evaluation and understanding of unmet community needs, lead the coordination of comprehensive programs and services to residents aged 55 and over in Delaware County as measured by regular input from internal and external stakeholders.

Capacity:

Maintain the promise to serve the increasing number of Delaware County residents aged 55 and over, as evidenced by no waiting lists for those SourcePoint services designed to help them to remain in their homes.

Access:

Enable Delaware County residents aged 55 and over to connect with SourcePoint through inclusive, meaningful engagements that meet their needs, achieving representation of those with needs in each of the geographic areas of the county.

Quality:

Offer high quality information, programs and services to residents aged 55 and over in Delaware County., which meets or exceeds internal and external standards for excellence set for each program or service and for management and governance practices.

Brand Positioning:

Strengthen SourcePoint’s leadership position as the resource, starting point and provider of services and programs for residents aged 55 and over in Delaware County as measured by regular input from internal and external stakeholders.

Strategies by Goal

Scope:

Through identification, evaluation and understanding of unmet community needs, lead the coordination of comprehensive programs and services to residents aged 55 and over in Delaware County as measured by regular input from internal and external stakeholders.

Scope Strategies:

- Identify, prioritize and determine the necessary services and programs that SourcePoint will appropriately support to meet community needs using customer feedback, SourcePoint research, and other community assessments.
- Develop a plan to support, monitor and evaluate these services and programs.

Capacity:

Maintain the promise to serve the increasing number of Delaware County residents aged 55 and over, as evidenced by no waiting lists for those SourcePoint services designed to help them to remain in their homes.

Capacity Strategies:

- Plan for and secure adequate financial resources.
- Secure and maintain necessary infrastructure and human resources.

Access:

Enable Delaware County residents aged 55 and over to connect with SourcePoint through inclusive, meaningful engagements that meet their needs, achieving representation of those with needs in each of the geographic areas of the county.

Access Strategies:

- Ensure availability of services to increase diversity through an attitude of inclusiveness to those 55 and older in Delaware County.
- Identify and remove access barriers of transportation, technology, physical condition, communication (type and frequency) among those 55 and older in Delaware County.
- Extend community programs and services for those 55 and older throughout the county as determined.

Quality:

Offer high quality information, programs and services to residents aged 55 and over in Delaware County, which meets or exceeds internal and external standards for excellence set for each program or service and for management and governance practices.

Quality Strategies:

- Continue to evaluate, identify and improve key quality measures.
- Achieve set measures and benchmarks that monitor quality.
- Ensure that procedures, information and training are focused to improve quality.
- Determine the best ways to measure and improve quality, customer service excellence and best practices in management and governance.

Brand Positioning:

Strengthen SourcePoint's leadership position as the resource, starting point and provider of services and programs for residents aged 55 and over in Delaware County as measured by regular input from internal and external stakeholders.

Brand Positioning Strategies:

- Create a consistent understanding among staff, volunteers, and program participants that SourcePoint is one organization that has a broader community role beyond providing services and programs, and encourage the staff to live the brand.
- Reaffirm a consistent understanding among internal and external stakeholders that SourcePoint should be at the table whenever policy, funding, or services affecting adults aged 55 and older are being considered.

Strategic Planning Supporting Documentation

Strategic Planning Objective:

Develop a 3-5-year strategic plan to fully address key issues using comprehensive internal and external information resulting in consensus and actionable decisions.

Approach:

- Define key Issues with SourcePoint Board (2016)
- Research SourcePoint communities (2016-2017)
- Hold Strategic Planning sessions (2017)
- Develop the Strategic Plan (2017)

Strategic Planning Sessions:

- Planning Session 1: Implications of research studies
- Planning Session 2: Impact of environmental factors and SWOT Analysis
- Planning Session 3: Goal Setting – Role and Mission/Vision Review
- Planning Session 4: Formulation of Strategy Options for each Goal
- Planning Session 5: Review of Draft Strategic Plan

Strategic Planning Committee:

- David Black, Board President, Westerville, Financial Management (retired)
- Kimberly Clewell, Director of Operations
- Bob Horrocks, Executive Director
- Fred Johnson, Board Member, Galena, Engineering, Finance, CIO (retired)
- Joan Lawrence, Board Member, Galena, State Representative 1983-1999, Director, Ohio Department of Aging 1999-2005 (retired)
- Jane Nance, RN Board Member, Westerville, Past President, Professor of Nursing (retired)
- Kim Schuette, Director of Communications and Development
- Stephanie Steinbeck, Director of Community Programs
- Fara Waugh, Director of Client Services
- Sara Stemen – Committee Coordinator
- Joan Manter, Manter Consulting - Facilitator

Key Issues:

- How should SourcePoint continue to grow and position itself as an organization in the next 2-4 years?
- How can SourcePoint extend their reach to unserved persons aged 55 and over in Delaware County?
- Where should SourcePoint responsibly deploy their resources to honor their Mission?
- Which are the optimal relationships to pursue to best meet community needs and maintain support?

Key Environmental Factors

Economic Factors

SourcePoint is highly reliant on a resource that is increasingly difficult to grow.

Demographic Factors

There are increasingly large numbers of older adults needing more services in Delaware County.

Competitive Factors

SourcePoint needs to have a strong and clear quality position in many markets—labor, services, government, voters.

Customer Factors

SourcePoint must have the ability to serve multiple types of customers with diverse and changing expectations.

Cultural and Social Factors

SourcePoint needs to adapt effectively to changing communities in an evolving competitive environment.

Political and Legislative Factors

There is a continuing commitment to in-home care and advocating for the needs of those who are not Medicaid eligible.

Legal and Regulatory

With uncertainty/change in federal, state and local laws, SourcePoint must effectively manage compliance.

Technology

Changing technology for connectivity, productivity, compliance, cyber security requires continuous investment.

Partners and Vendors

SourcePoint must monitor and ensure quality and appropriate capacity of partners and vendors.

Strengths, Weaknesses, Opportunities and Threats

Strengths:

- Staff
- Identity/Reputation
- Quality programs/ Enrichment Center programs
- Volunteers
- Governance/Leadership/Administration
- Community Relationships, Partnerships, Support
- Financial Support
- Facility

Weaknesses:

- Geographical reach
- Issues with providers (capacity, quality, consistency)
- Communication
- Internal communication
- Technology
- Too dependent on one funding source
- Lack of diversity
- Physical space – volume of space and distances can be difficult for aging seniors

Opportunities

- Growth/Expanding Reach (service and communication)
- New and expanded partnerships
- Communication
- New expanded and specialized programs and services
- Partnerships with medical community
- Development

Threats:

- Changes in governmental regulation at all levels
- Large percent of homeowners paying large percent of their income on their homes
- Public opinion
- Competitors
- Rising costs
- Workforce availability and quality
- Fake news/need for credible information

Research of SourcePoint Communities

Research Objectives:

1. Learn how SourcePoint can best serve individuals and families.
2. Examine the extent to which SourcePoint is serving the older population of Delaware County.
3. Determine the awareness of the range of SourcePoint service, program and activity offerings.
4. Assess the perceived strengths and weaknesses of SourcePoint.
5. Discover the overall perceptions of SourcePoint.
6. Identify any barriers to using SourcePoint's services.
7. Explore the most important opportunities and challenges for SourcePoint during the next 2-3 years.

Research Components:

1. In-Home Care Clients/Caregivers in-person and telephone interviews
2. In-Home Care Consultants focused meetings
3. Customer Service and Enrichment Center Staff focused meeting
4. Volunteers focused meeting
5. Management Team and Selected Board Members focused meeting
6. Executive interviews with Key Community Stakeholders
7. Enrichment Center Member online study
8. Market Study - county-wide telephone study

Research Conducted

Participant Overview

- Twenty-six **Community Stakeholders** were interviewed from ten community agencies, four governmental entities, three police and fire departments, three Chambers of Commerce, three community partner organizations and two provider vendors.
- There were nine **SourcePoint Board Members** and nine **SourcePoint Management/Staff Members** who participated in a focused group meeting.
- There were nine **SourcePoint Volunteers** with a group average tenure of almost six years participating in a group discussion.
- Ten **SourcePoint in-Home Care Clients** were personally interviewed from Delaware, Westerville, Ashley, Lewis Center, Powell and Sunbury.
- Nineteen **SourcePoint in-Home Care Consultants**, with an average tenure of almost six years) participated in two group discussions including nine Care Consultants, two Client Services supervisors, two information and referral specialists, two insurance specialists, two Service Coordinators, one Volunteer Program Specialist and one Caregiver Program Coordinator.
- Eight **SourcePoint Customer Service and Enrichment Center Staff** participated in a focused meeting. This included Customer Service Assistant, Administrator Support Supervisor, Accounting Coordinator, Enrichment Center Program Manager, Arts and Education Manager, Member Experience Coordinator and Food and Beverage Services Manager.
- There were 334 **SourcePoint Enrichment Center Members** who completed an e-survey representing members aged 55 to over age 85 living in Delaware County.
- Two hundred randomly sampled **Delaware County Residents aged 50 and over** participated in a confidential telephone study. Thirteen Delaware County zip codes were represented in this study. Forty-two percent of participants were aged 65-74, 27% aged 55-64, 18% were 75-84, 10% were 50-54 and 5% were 85 years old and older.

Research Overview

- SourcePoint is effectively serving Delaware County based on the community stakeholder interviews. This is due to their positive reputation in the community, strong community participation, large Meals-on-Wheels program, strong volunteer program, multitude of services, information and resources provided and partnerships with other community agencies.
- Based on the random sample market study, SourcePoint is a valuable asset to Delaware County residents aged 55 and over, Delaware County residents should vote to support SourcePoint's levy funding, SourcePoint is accessible to Delaware County residents aged 55 and over, and SourcePoint's Enrichment Center provides quality programs.
- Sixty-eight percent of the Delaware County respondents aged 50 and over familiar with SourcePoint had a positive impression of this organization and 29% had a neutral impression.
- The majority (87%) of Delaware County respondents over age 50 and over in the Market Study who were familiar with SourcePoint would recommend SourcePoint to others.
- SourcePoint's greatest recent successes or accomplishments were cited to be visibility/awareness/rebranding, consolidation with Senior Citizens Inc., growth and change, facility, expanded offerings, facility.
- SourcePoint strengths included staff, identity/reputation, quality programs/Enrichment Center programs, volunteers, governance/leadership/administration, community relationships/partnerships/support, variety of services offered, ability to meet changing needs, funding/financial, Meals on Wheels. Weaknesses identified included: geographical reach, issues with providers, leadership/board, administrative, transportation, name change/awareness of new name, communication
- SourcePoint's opportunities included growth/expanding reach, new and expanded partnerships, communication, new expanded and specialized programs and services, new Enrichment Center programs.
- Challenges for SourcePoint included: growth/capacity/plan for growth, funding challenges/funding-one main revenue stream, workforce/workforce issues, rising costs/rising cost of care, awareness/visibility/reputation
- Key success factors for SourcePoint included leadership/board/management, community relationships/partnerships, manage growth, funding, being the central information resource for Delaware County, reputation/identity, planning/strategic planning, awareness/communication.
- Key barriers that would keep SourcePoint from being successful included funding/levy, increasing costs. Service gaps that SourcePoint needs to address include transportation, expanded outreach/expanded access, capacity, services, workforce.

Summary of Key Research Findings

Effectively Serving Delaware County

- SourcePoint is effectively serving the older population of Delaware County based on the community stakeholder interviews. Although respondents believe that SourcePoint does an effective job in serving seniors, some feel that SourcePoint may not be serving all parts of the county nor all ages needing services.
- Reasons for stakeholder interviewees feeling that SourcePoint is effectively serving the older population of Delaware County include: Positive reputation in the community, strong community participation, large Meals-on-Wheels program, strong volunteer program, multitude of services, provide information and resources and partnerships with other community agencies.
- Eighty-four percent (mean of 4.5 out of 5) of Enrichment Center member study participants agreed that SourcePoint overall as an organization is effectively serving the older population of Delaware County.
- Ninety-four percent of Enrichment Center member study participants agreed that SourcePoint is a valuable asset to Delaware County residents aged 55 and over. Eighty-four percent agreed that SourcePoint is accessible to Delaware County residents aged 55 and over.
- Eighty-seven percent of Enrichment Center member study participants agreed that the Enrichment Center provides quality programs with 76% agreeing that the Enrichment Center provides programs that they enjoy. Almost 80% agree that they get value from their Enrichment Center membership.
- Ninety percent of Enrichment Center member study participants agreed that Delaware County residents should continue to vote to support SourcePoint. When seventeen SourcePoint offerings were rated by Enrichment Center member study participants, the average rating was 90%.
- Seventy-four percent of Enrichment Center member study participants stated that they believed that their life had changed for the better as a result of SourcePoint with almost 20% not sure.
- The majority (87%) of Delaware County respondents over age 50 and over in the Market Study who were familiar with SourcePoint would recommend SourcePoint to others. Only three respondents (3%) would not recommend SourcePoint. The main reason for recommending SourcePoint was past experience (25%) and programs and services offered (23%).
- Delaware County market study respondents who were familiar with SourcePoint rated their level of agreement with four statements on a scale of 1 to 5, where 5= strongly agree and 1=strongly disagree. The resulting mean agreement scores were all very high (above 4.3), with the highest being SourcePoint is a valuable asset to Delaware County residents aged 55+ (4.5), followed by Delaware County residents

should vote to support SourcePoint's levy funding (4.4), SourcePoint is accessible to Delaware County residents aged 55 and over (4.4), and SourcePoint's Enrichment Center provides quality programs (4.3).

- Overall, 59% of those surveyed in the market study with a random sample of Delaware County residents aged 50 and over were familiar with SourcePoint. Based on age group, those 75+ (64%) were most familiar with SourcePoint, while those 50-54 (26%) were least familiar. Of the 117 respondents who were familiar with SourcePoint, 44% believed that the main purpose of SourcePoint was to provide services and assistance for older adults. There were 27% stating the purpose was to provide social activities and 26% mentioned providing information, advice and education.
- Sixty-eight percent of the Delaware County respondents aged 50 and over familiar with SourcePoint had a positive impression of SourcePoint, 29% had a neutral impression, and 3% had a negative impression.

SourcePoint's Greatest Recent Successes or Accomplishments

- Visibility/Awareness/Rebranding
- Consolidation with Senior Citizens Inc.
- Growth and change
- Facility
 - Programs and Services (Caregiver Respite Program, Caregiver Coordinator),
 - Volunteer transportation, Insurance Counseling
- Expanded offerings
 - Expanded hours and Growth of Meal on Wheels
 - First Program/Outreach program with EMS
 - Services to those aged 55-60
 - Home outreach/caregiver support team
 - Increase in enrichment activities, depth and breadth of services
- Governance/Administration
- Development program

SourcePoint's Strengths

- Staff
- Identity/Reputation
- Quality programs/ Enrichment Center programs
- Volunteers

- Governance/Leadership/Administration
- Community Relationships/Partnerships/Support
- Variety of services offered
- Ability to meet changing needs
- Funding/Financial
- Enrichment Center
- Meals on Wheels

- Mission
- Visibility/Marketing Communications
- Facility/Location
- Performance
- Uniqueness
- Provide services needed by homecare clients
- The Communicator
- Care consultants
- Insurance counseling and education
- Meals at the Enrichment Center
- In-home care program
- Caregiver support and education

- The strengths most often identified by Delaware County residents aged 50 and over in the market study familiar with SourcePoint included programs and activities (22%), Meals on Wheels (16%), and providing information (11%).

What In-Home Care Clients liked Best about SourcePoint

- Emergency response system
- Food
- Incontinence supplies
- Transportation to medical appointments
- Convenient location
- Nutritional supplements
- Foot care
- Responsiveness
- Confidence that they will be referred to a good resource for services not provided by SourcePoint)

SourcePoint's Weaknesses

- Geographical Reach
- Issues with providers

- Leadership/Board Administrative
- Transportation
- Name Change/Awareness of new name
- Communication
- Internal communication
- Internal focus
- Meals
- Scheduling
- Organization/Process issues
- Physical Space -difficult for aging seniors
- Technology
- Too dependent on one funding source
- Lack of diversity
- Enrichment Center program and activities/special events

- When asked what SourcePoint needs to improve, do not know/nothing was the response, given by more than half (54%) of the market study respondents who were familiar with SourcePoint. The top suggestions for improvement were related to advertising/marketing/publicity (17%) and communication (9%).
- When participants in the market study were asked what SourcePoint needs to do better, the most common answer was do not know (46%), followed by advertising and marketing (26%).

SourcePoint's Opportunities

- Growth/Expanding Reach
- New and expanded partnerships
- Communication

- New expanded and specialized programs and services
- New Enrichment Center programs (pickle ball, lap pool, basketball/gym, larger facility, salon, massage therapists)
- Communicate clear understanding of programs and services

- Transportation
- Staff
- Partnerships with medical community
- Make sure employees are heard and understood
- Ensuring timely referrals
- Change in the days and times that programs are offered
- Position as an information source
- Land
- Changes in the SourcePoint facility
- New ways to fund programs
- New development program

- Almost 60% of Delaware County residents aged 50 and over could not state the opportunities SourcePoint should consider in their planning in the market study.

SourcePoint's Challenges

- Growth/Capacity/Plan for growth
- Funding challenges/Funding-one main revenue stream
- Workforce/workforce issues
- Rising costs/Rising cost of care
- Awareness/Visibility/Reputation

- Increased need for new services
- Increased need for in-home care
- New diverse needs to be met
- Aging population
- Diversity
- Managing changing needs and preferences
- Awareness and acceptance of older adults by those closer to 55
- Enrichment Center class options
- Understanding who we are
- Communication
- Volunteer issues
- Improve management of the volunteer program
- Safety
- Combine services with those with disabilities
- Getting services into the home
- Transportation shortfall
- Change in the days/times that programs are offered

- *Funding (45%) and growing number of people to serve (25%)* were identified by market study respondents familiar with SourcePoint as challenges that SourcePoint will likely face in the coming years.

Key Success Factors for SourcePoint

- Leadership/Board/Management
 - Community Relationships/Partnerships
 - Manage growth
 - Funding
 - Being the central information resource for Delaware County
 - Reputation/Identity
 - Planning/Strategic Planning
 - Awareness/Communication
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- Commitment to the SourcePoint vision
 - Culture and “can do” attitude
 - Expertise
 - Adaptability
 - Performance/Initiatives
 - Maintain commitment to serving
 - New/expanded services
 - Facilities
 - Continued focus on volunteers
 - Staff retention/satisfaction
 - Better meet the needs of clients
 - Outreach
 - Plan for recruiting the “volunteer of the future”
 - Communicate strong value proposition

Barriers that would keep SourcePoint from being Successful

- Funding/Levy
- Increasing costs
- Meeting diverse needs
- Differing/changing taste preferences for food (Meals on Wheels)
- Capacity
- Single location for all of Delaware County
- Planning/Succession Planning
- Increasing costs
- Workforce issues
- Contract issues
- Alienate their providers-barrier to future providers
- Regulatory Changes
- Technology issues
- Awareness /understanding of services
- Marketing/communication
- Gaining trust/agreement to get care
- Mix of help from families
- Communication with primary care physician office
- Transportation/DataBus

Service Gaps that SourcePoint needs to Address

- Transportation
- Expanded Outreach/ Expanded Access
- Capacity
- Services
- Workforce
- Client medical advocate
- Homemaker/home chores services
- Home companion service
- Choice of food options
- Adult daycare during Enrichment Center activities
- Help in finding housing
- Home health aides for those with dementia

How SourcePoint can best Serve Individuals and Families

- Expanded Outreach/ Expanded Access
 - Community/Healthcare/Church Relationships
 - Understand people they serve
 - Programs and Services
 - Community Support and awareness
 - Continue to move forward
 - Communicate clear understanding of programs and services
 - Expanded geographic communication
 - Fee-based services
 - Grass roots approach to growth
 - Different memberships for Enrichment Center
- Delaware County residents aged 50 and over rated all SourcePoint programs. Meals on Wheels (3.7), transportation to medical appointments (3.6), personal care in the home (3.4), Medicare education (3.4), and caregiver support and education (3.3) were most commonly assigned the rating of must have. These services had the highest mean necessity scores based on a scale where 1.0 = not necessary and 4.0 = must have.

Things at SourcePoint that Should Change

- Transportation/Accessibility
- Communication and awareness
- Times of EC classes
- Volunteer training to reflect consistent messaging
- Staff
- Services
- Expanded scope and outreach
- Transparency/Communication
- Community Relationships
- Data and use of data
- Technology
- Food provided by Meals on Wheels
- Quality of homemaker services
- Make it clear who can access services
- Help to find housing
- Provide access for younger spouses
- Improved handicapped accessibility/parking

Things that should stay the same at SourcePoint

- Volunteer Program
- Mission and values
- Leadership/Staff

- Programs and Services
- Enrichment Center activities
- Community Relationships
- Culture/Philosophy
- Willingness to change/take risks
- Service to home care clients
- Awareness/Visibility/Identity
- Quality of services
- Client contact
- Educate/convince those to seek and accept assistance
- Benefits offered to home clients
- Meals on Wheels
- Farmers markets

Service Preferences

- When asked how far they were willing to drive to take an art class, fitness class or join a social group for recreation, over half (52%) of all market study respondents were agreeable to a distance of 5-15 miles. Thirty-four percent were willing to travel less than five miles, while 10% would drive over 15 miles.
- For market study respondents wanting to take an art class, fitness class or join a social group for recreation, 21% mentioned the YMCA, 16% mentioned and Westerville Community Center and 14% cited SourcePoint. Twenty-five percent did not know.
- Of the market study respondents who would take classes (195), most (68%) preferred to take social or recreational classes with participants of mixed ages. Among this group, 60% were most likely to look on the Internet for information on these programs and activities (79% search engines, 24% social media and 15% websites).
- Market study participants rated the importance of ten different aspects of in-home care services on a scale of 1-4, where 1 = not important and 4 = very important. All ten mean importance scores were quite high (above 3.0), with care worker passed background check (3.9), privacy of information (3.8), and cost (3.7) being in the top three positions. Very important was the most commonly assigned rating for nine out of the ten aspects.
- Overall, market study respondents were more likely to believe that they would receive better in-home services from a private (41%) company than from a non-profit (33%) or government (6%) organization.