Strategic Plan 2023-2026

Strategic Plan Components:

Strategic Plan

Strategic Plan Supporting Documentation

Strategic Plan 2023-2026

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.

Values

Respect, Compassion, Interdependence, Excellence, Stewardship, Advocacy

Strategic Plan Goals 2023-2026

Managing Growth and Capacity

Lead the coordination of accessible and comprehensive programs and services for Delaware County residents aged 55 and over and caregivers. Provide education/advocacy with community partners to expand collaboration for programs, services, and the management of service gaps.

Reach, Access, and Engagement

Enable Delaware County residents aged 55 and over and caregivers to connect with SourcePoint through accessible, inclusive programs and services that respond to individual needs and personal situations.

Scope and Change

Establish priority areas to meet the diverse and changing needs of Delaware County residents aged 55 and over and caregivers and ensure appropriate allocation of available resources.

Awareness and Image

Increase awareness and strengthen SourcePoint's leadership position as the accessible resource, starting point, advocate, and provider of quality services and programs for Delaware County residents aged 55 and over and caregivers.

Quality

Drive decisions with quantitative and qualitative data to offer high quality information, programs, and services that meet established standards for excellence in every area of operation.

Strategic Plan 2023-2026

Strategies by Goal

Managing Growth and Capacity

Lead the coordination of accessible and comprehensive programs and services for Delaware County residents aged 55 and over and caregivers. Provide education/advocacy with community partners to expand collaboration for programs, services, and the management of service gaps.

Managing Growth and Capacity Strategies:

- Proactively address county growth by effectively providing select programming throughout the county.
- Lead the Age-Friendly initiative in Delaware County and work with other community partners and coalitions to appropriately manage and address service gaps.
- Secure adequate sustainable funding sources.

Reach, Access, and Engagement

Enable Delaware County residents aged 55 and over and caregivers to connect with SourcePoint through accessible, inclusive programs and services that respond to individual needs and personal situations.

Reach, Access, and Engagement Strategies:

- Ensure welcoming and inclusive programs and services through targeted or expanded outreach to all, including those with racial, ethnic, and cultural differences, as well as those experiencing challenges with abilities and isolation.
- Eliminate access barriers of technology, physical and mental health condition, communication, transportation, and housing, and enhance inclusion by "meeting individuals where they are."
- Establish programs that address life stage changes, financial and emotional adjustments related to retirement planning, estate planning, government benefits, and other needs to enhance engagement.

Scope and Change

Establish priority areas to meet the diverse and changing needs of Delaware County residents aged 55 and over and caregivers and ensure appropriate allocation of available resources.

Scope and Change Strategies:

- Identify, prioritize, and assess programs and services based on effectiveness in meeting a community need and participant volume expectations, availability of sufficient resources, and other criteria for continuation, revision, or adoption.

Awareness and Image

Increase awareness and strengthen SourcePoint's leadership position as the accessible resource, starting point, advocate, and provider of quality services and programs for Delaware County residents aged 55 and over and caregivers.

Awareness and Image Strategies:

- Communicate relevance to Delaware County residents to engage with SourcePoint early and understand how SourcePoint will support them as their needs change.
- Create inviting and welcoming messaging to address misperceptions.
- Position SourcePoint as a good steward of public funds by demonstrating value.
- Identify the critical touchpoints between SourcePoint and community partners to use as opportunities to increase awareness of services and programs.

Quality

Drive decisions with quantitative and qualitative data to offer high quality information, programs, and services that meet established standards for excellence in every area of operation.

Quality Strategies:

- Use leading outcome measures and benchmarks to measure, monitor, and manage quality and effectiveness.
- Establish, evaluate, and improve key quality measures including customer service excellence, community engagement, and best practices.

SWOT Analysis - Strengths, Weaknesses, Opportunities and Threats

Strengths:

<u>Reputation</u>

Dedication to mission and vision, advocacy role, outreach, integrity, innovative, creative, being open-minded, flexibility, strong, supportive leadership/caring staff/operations, communication, responsiveness, meeting community needs, strong community support, caring staff, specifically care consultants as being there when needed, checking up, being proactive, offering kindness, helpful in offering services, facility/Enrichment Center

<u>Programs and Services</u>

Wide variety of programs, comprehensive services, Meals on Wheels, social programs and trips, arts, fitness, educational programs, medical transportation, housekeeping services, respite care, insurance counseling, caregiver support, meals, in-home care program, volunteer opportunities

<u>Financial Position</u>

No debt, available reserves, strong operations and IT, transparency, successful at acquiring grants, good use of public funds, strong past support of levy, strong engagement of grantees, contractors, Age-Friendly partners, sponsors, funders, community groups

Weaknesses:

<u>Managing Growth and Change</u>

Ability to be ready to manage growth, meet growing and diverse client and community needs with sufficient programs/services, need to ensure sufficient financial resources to support growth

<u>Reach and Access</u>

Lack of awareness, stigma of age, elite membership image, marketing, expanded outreach and access needed, challenging diversity efforts including awareness of cultural difference like- language, religion, values, and attitudes, mobility, transportation to services and to meet medical needs

<u>Sustainable Resources</u>

Workforce issues, need more in-home care workers, more volunteers, need new revenue streams, development, funding facility changes

<u>Scope and Capacity</u>

Limited capacity of building with minimal expansion possible for additional availability and variety of programs, classes, events, and activities

Opportunities:

<u>Reach and Access</u>

Managing growth and change in meeting increasing numbers of clients' needs through new and expanded partnerships, expanded awareness and outreach, continue to creatively use facility, provide programming at other locations

Targeted Areas to Serve

Effectively serve those aged 55-65, diverse, unserved, underserved communities, meet challenges for new, transitory residents through targeted awareness, programs, and services, assess rates of disability and functionality for homecare and work with expanded home and community-based services (HCBS) options covered by health insurance

Increased Awareness

Effectively communicate SourcePoint's use of levy funds, raise awareness and increase outreach, advocacy to bring more services to partners, continue leadership role in the Age-Friendly initiative

Economic and Financial Initiatives

Achieve sustainable funding sources, new revenue streams, continue to engage the community to address needs, growth, need for new programs

Address Scope and Capacity

Evaluate return on investment (ROI) on any new programs or changes of days and times to increase capacity and maximize program space

Threats:

Scope and Capacity
Growing number of people to serve with new and diverse needs, more in-home care needs, collaboration for affordable housing, transportation, mission creep, space limitations at existing building for continued growth in both staff and programming

Legal and Regulatory Issues
Potential changes to federal, state, and local government policy may impact programs and services as well as SourcePoint's and their partners' ability to comply, political climate considerations

Economic/Financial Issues

Current inflation with higher percentage of household budgets spent on housing, Consumer Price Index (CPI) increasing, funding challenges, outcome of SourcePoint levy renewal, increasing property/plant/equipment expenses, cost of expanded outreach and compliance, client ability to afford copays and impact on sliding fee scale, unfunded mandates, rising cost for wages and benefits, and the ability to fund scope and capacity

Workforce Issues

Staffing turnover and worker shortages, both internally and with our vendors (home care is the top user of vendor services), volunteer pool not all returning, local COVID-19 variants transmission rates and related consequences

Community Health and Well-Being

Delaware County residents aged 65 and over are disproportionately affected by high blood pressure, high cholesterol, arthritis, declining life expectancy, limitations with management of aspects of daily living, being overweight or obese (*Source: 2022 Delaware County Community Health Assessment)*. Older adults are also experiencing elder abuse, financial scams, and self-neglect.

Significant Implications of the Research and Environmental Factors

The committee identified these implications through discussion as part of the strategic planning process

Population Growth

- Delaware County is the fastest growing county in Ohio, growing 22.9% from the 2010 to 2020 census (*Source: US Census Bureau Quick Facts)*
- The 55 and over population grew 45.7% from 2010 to 2020, a greater rate than the overall population (*Source: US Census Bureau 2010 Census and US Census Bureau American Community Survey)*
- It is anticipated population growth will continue.

Workforce Issues

- The current workforce supply crisis impacts home care, mental health services, meals/nutrition, and also transportation, and has further challenged SourcePoint's volunteer workforce.
- There is a need for an increased number of professional caregivers (personal care and respite workers), programs, and services due to population growth.
- There are increased associated costs due to companies/agencies needing to increase benefits and pay to recruit and retain workers.

Outreach Issues

- There are challenges in the ability to meet the varied needs of the urban, suburban, and rural areas of the county.
- There is a need to reach people before they are in crisis when a lot of services are needed quickly.
- There is a desire to ensure SourcePoint is top of mind when preparing for future needs, as well as when needs arrive.

Awareness

- Awareness of SourcePoint and receptivity to learning what is offered and how needs can be met is important.
- It is important that collaborative partners know where to funnel people when needs are identified.
- It is imperative to meet people where they are to establish relationships, including partnering with organizations who can educate and promote SourcePoint services.

Scope and Capacity

- There is a need to clearly outline priority areas, as each decision to fund one area means another area cannot be funded.
- It is important to partner for programming with private and public sector organizations to avoid overlap and expand capacity without overly increasing operational costs.

Economic/Financial Issues

- There is a recognition of financial concerns associated with workforce, food, and growth.
- How can SourcePoint be the stop gap by serving those who can pay versus those who cannot and may "fall through the cracks?"
- Resource issues may constrain the scope of meeting needs of those who have no other options through limits on eligibility or using our sliding scale across all programs.
- Maintaining the "no wait list" as a promise to voters is a challenge.

Strategic Plan Supporting Documentation

Strategic Planning Objective:

Develop a 4-year strategic plan to fully address key issues using comprehensive internal and external information resulting in consensus and actionable decisions.

Approach:

- Key issues defined by research
- Board member kick-off – discussion of key themes
- Five strategic planning sessions
- Draft strategic plan reviewed
- Strategic plan completed

Strategic Planning Sessions:

- Session 1: Implications of research studies   (3/22/22)
- Session 2: Impact of environmental factors   (4/5/22)
- Session 3: SWOT analysis   (4/19/22)
- Session 4: Review of goals and strategies for each goal   (5/17/22)
- Session 5: Review of draft strategic plan   (6/2/22)

Strategic Planning Committee:

Board Members

Adrienne Corbett	Retired	Non-profit Executive
Karen Crosman	Ohio Wesleyan University	Director-Lifelong Learning Program
Gretchen Roberts	OhioHealth	Director of Nursing
Jane Taylor	AARP	Retired State Director

Community Agencies

Jen Keagy	Delaware Public Health District	Deputy Health Commissioner
Lexi Petrella	Mid-Ohio Regional Planning Comm.	Senior Planner

SourcePoint Leadership/Staff

Fara Waugh	SourcePoint	Chief Executive Officer
Kim Clewell	SourcePoint	Chief Financial Officer
Amy Schossler	SourcePoint	Director of Community Programs
Alison Yeager	SourcePoint	Director of Communications & Development
Karen Waltermeyer	SourcePoint	Director of Client Services
Amelia Tucciarone	SourcePoint	Strategic Advancement Administrator

Joan Manter, Manter Consulting - Facilitator

Scope of Research Conducted

Research Objectives:

1. Identify key environmental factors affecting SourcePoint in the next 3-5 years.
2. Understand SourcePoint's strengths, weaknesses, opportunities, and threats through the perspectives of key internal and external SourcePoint constituencies.
3. Determine the current and projected needs of Delaware County's 55+ community.
4. Assess the perceptions of SourcePoint among selected residents aged 55 and over in Delaware County.

Research Studies: 2021

1. Executive telephone interviews with board
   - 17 board members interviewed
2. Facilitated focused meetings via Zoom
   - 4 one-hour focused meetings were conducted via Zoom with 25 internal SourcePoint staff:
     - Leadership team, in-home care staff, community program staff
3. Volunteer/member e-study
   - Links emailed to volunteer and members to complete an on-line survey. There were 709 respondents 398 member only, 134 volunteer only, 118 both volunteer and member and 59 had other relationships with SourcePoint.

Research Studies: 2022

Confidential telephone interviews with 26 key external stakeholders

- 7 community agencies (*Two persons from one of these organizations were interviewed*.)
- 11 governmental entities, including county sheriff and county fire and EMS departments (*Two persons from one of these organizations were interviewed*.)
- 2 Chambers of Commerce
- 3 community partner organizations
- 2 provider vendors

Confidential telephone interviews with in-home care clients

- 13 interviews with SourcePoint clients or caregivers

Community e-study with Delaware County residents

- 864 community respondents

Research included 751 internal stakeholders and 903 external stakeholders resulting in 1,654 total perspectives to support this strategic plan.

Research Results

Research results represent information collected from the studies conducted for this strategic plan, unless otherwise stated.

Community Needs 55+

Most Needed Services (n=864- Community Study)	#	%
Social needs	489	57%
Transportation	454	53%
In-home respite care needs (short-term or routine care, support, and supervision)	406	47%
Meals	391	45%
Fitness needs	366	42%
Homemaking needs (such as cleaning and laundry)	357	41%
Caregiver concerns	343	40%
Housing	265	31%
Personal care needs (such as bathing, dressing, etc.)	246	29%
Financial management	240	28%
Chores/ handyman services	12	1%
Managing legal concerns/ insurance	11	1%

Responses by less than 1% of respondents included: technology assistance/online education, how to access services, mental health support, extend programs to evening hours; and 6% did not know.

Unmet Needs (n=761-those responding to this question -Community Study)	#	%
Housing	114	15%
Transportation	102	13%
Social needs	98	13%
In-home respite care needs (short-term or routine care, support, supervision)	96	13%
Homemaking needs (such as cleaning and laundry)	88	12%
Caregiver concerns	76	10%
Fitness needs	60	8%
Personal care needs (such as bathing, dressing, etc.)	56	7%
Financial management	52	7%
Meals	26	3%
Do not know	368	48%

Responses by less than 1% of respondents included: managing legal concerns/insurance, extend programs to evening hours, technology assistance/online education, chores/handyman services, mental health needs, support groups.
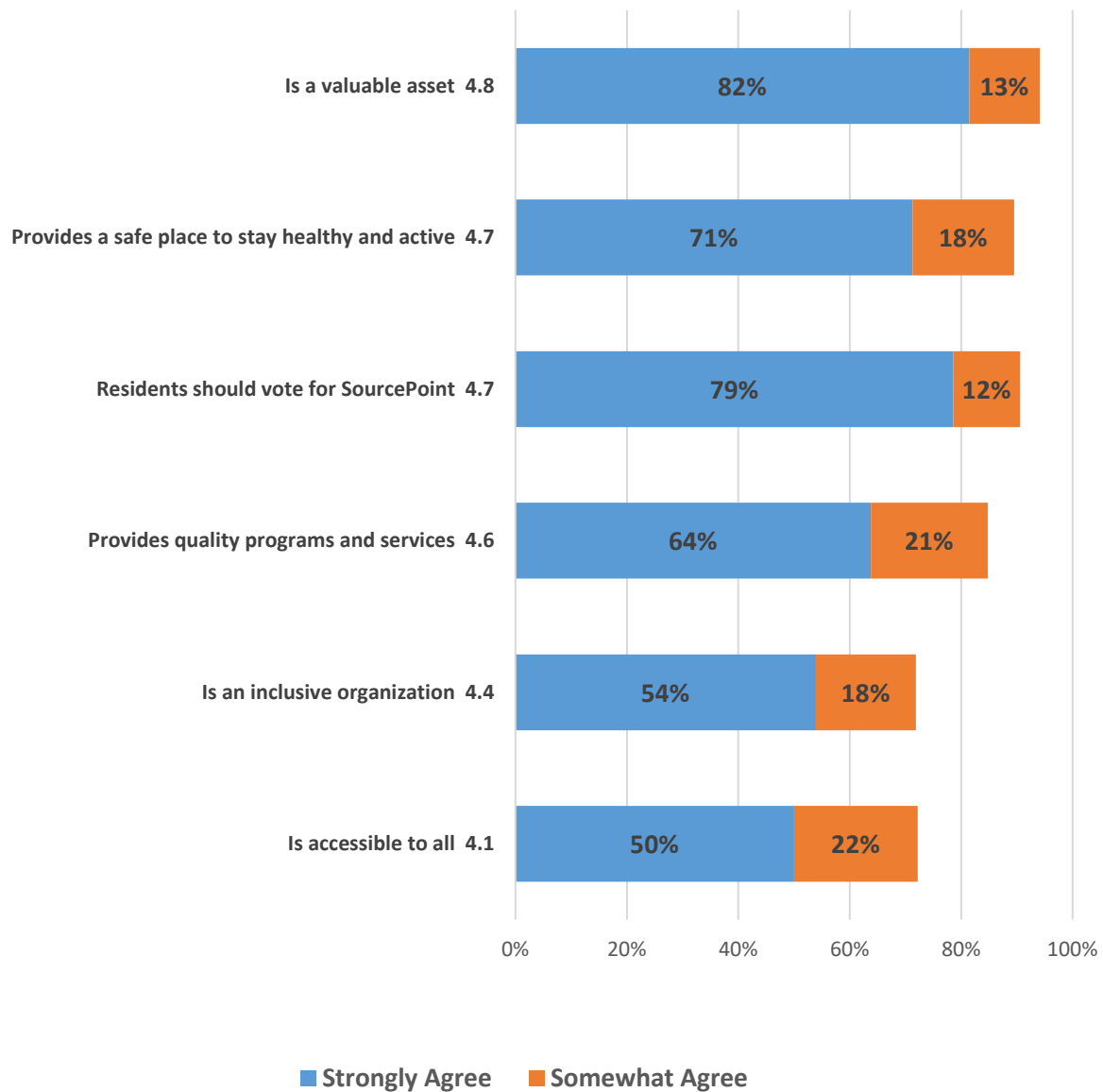
Research Results

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Perception of SourcePoint

Agreement with Statements about SourcePoint

Delaware County Residents 55 and Over, Familiar with SourcePoint

Statement	Strongly Agree	Somewhat Agree
Is a valuable asset 4.8	82%	13%
Provides a safe place to stay healthy and active 4.7	71%	18%
Residents should vote for SourcePoint 4.7	79%	12%
Provides quality programs and services 4.6	64%	21%
Is an inclusive organization 4.4	54%	18%
Is accessible to all 4.1	50%	22%

■ Strongly Agree   ■ Somewhat Agree

Research Results

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Perception of SourcePoint *(Results compiled from various studies)*

- ✓ 95-96% agree that SourcePoint is a valuable asset to Delaware County residents aged 55+.

- ✓ 90-94% agree that SourcePoint provides a safe place to stay healthy and active.

- ✓ 85-90% agree that SourcePoint provides quality programs and services.

- ✓ 72-78% agree that SourcePoint is accessible to all aged 55+.

- ✓ 72-77% agree that SourcePoint is inclusive/welcomes diverse populations.

- ✓ 91-92% agree that Delaware County residents should continue to vote to support SourcePoint.

Effectively serving the older population of Delaware County

- 79% of those familiar with SourcePoint *(Community Study)*
- 91% "yes"- through programs and services and helping people *(Volunteer and Member Study)*

Awareness of SourcePoint

- 88% of those familiar with SourcePoint *(Community Study)*
- Some concerns about awareness *(External Stakeholder Study)*
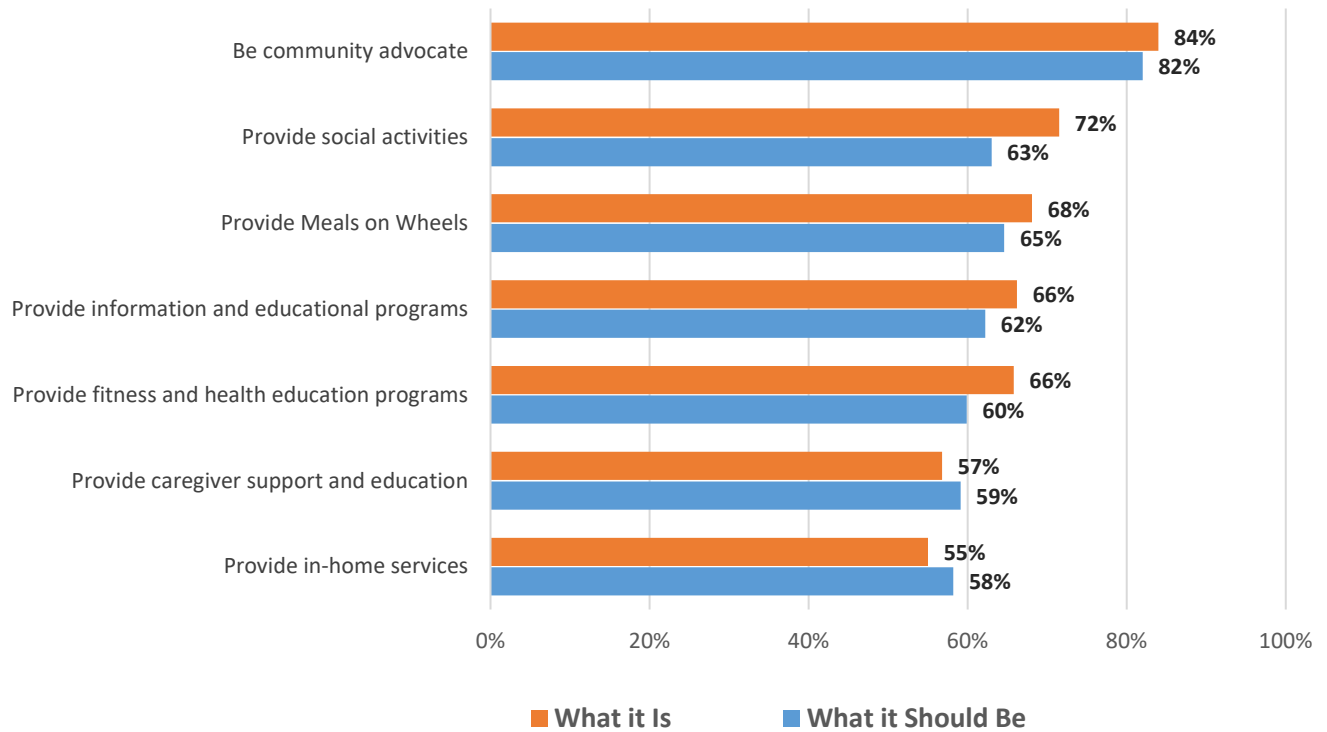
Recommending SourcePoint

- 88% *(Community Study)*

Lives changed for the better

- 88% *(Volunteer and Member Study)*
- Anecdotal comments of in-home care clients citing SourcePoint as a "lifeline"

Research Results

Research results represent information collected from the studies conducted for this strategic plan unless otherwise stated.

Purpose of SourcePoint
for Delaware County Residents Age 55 and Over

Purpose	What it Is	What it Should Be
Be community advocate	84%	82%
Provide social activities	72%	63%
Provide Meals on Wheels	68%	65%
Provide information and educational programs	66%	62%
Provide fitness and health education programs	66%	60%
Provide caregiver support and education	57%	59%
Provide in-home services	55%	58%

■ What it Is ■ What it Should Be

SourcePoint Performance

Need for Various Services *Delaware County Residents 55 and Over, Familiar with SourcePoint (Community Study)*	Number of Respondents	Must Have	Nice to Have
Meals on Wheels	657	72%	20%
Transportation to medical appointments	651	66%	25%
In-home respite care needs	646	51%	37%
Caregiver support and education	637	44%	43%
Personal care needs	646	42%	39%
Meals on-site or off-site locations	640	38%	48%
Fitness programs/health education	642	35%	56%
Insurance counseling and education	642	33%	50%
Homemaking needs	646	29%	55%
Non-medical transportation	632	24%	57%
Social programs and trips	647	22%	63%
Arts and educational programs	644	14%	67%

Research Results

Note: This information represents perspectives from various studies conducted for this strategic plan and includes some differing views.

SourcePoint Performance

Attributes	Strengths	Things to Change	What to Keep the Same	Barriers
Culture/ Mission Philosophy/Advocacy	✓		✓	
Awareness		✓		✓
Leadership and Staff	✓			
Access		✓		✓
Outreach	✓		✓	✓
Responsiveness	✓			
Partnerships	✓	✓		
Transportation		✓		✓
Medical transportation	✓	✓		
Programs and Services	✓		✓	
Resources available	✓			
Meals on Wheels/Meals	✓		✓	
Programs, classes, activities, events	✓	✓		
Fitness/Wellness	✓	✓		
In-home care	✓	✓	✓	
Caregiver Support	✓	✓	✓	
Volunteer Drivers			✓	
Volunteer Opportunities	✓	✓		
Communication	✓		✓	
Enhance communication including technology		✓		✓
Manage growth/capacity		✓		✓
Facility, location	✓		✓	✓
Financial/funding				✓
Workforce issues		✓		✓
Inclusion/Diversity		✓		✓
Balance between scope and capacity				✓

Note: 59% of respondents of the volunteer/member survey and 39% of the community study did not know things to change

Research Results

Research results represent information collected from the studies conducted and the research reviewed specifically for this strategic plan unless otherwise stated.

Selected Strategic Planning Issues based on research

What are the key success factors for SourcePoint?

- Broad planning focus with paced change
- Strong leadership, volunteers, and staff
- Innovativeness
- Community support
- Meeting needs with programs and services
- Communication, outreach, and access, including engaging those aged 55-65
- More resources with sustainable funding for growth
- Levy passing
- Facilities
- Integrating the Age-Friendly initiative

What do you believe should be the focus of the strategic plan?

- Embracing and managing change and growth
- Strategic framework to deal with opportunities and challenges and set goals
- Address innovation and address complacency
- Use data to drive decisions
- Enable sustainable resources
- Consider scope, capacity, and reach while managing access

Environmental Factors Impact Overview Summary

Environmental Area	Positive	Neutral	Negative
• Central Ohio Area on Aging	• Growing population those 60+, <other CO counties • Highest median household income in central Ohio • Lowest risk of social isolation calculated • Access to meals progressing	Survey asked "I hope my county": • Improves, helps caregivers through awareness, education, training, and support. • Is more accessible – walkability and transportation • Is generally more age and dementia- friendly	• Growing population 60+ • Highest 60+ population at or above 150% of poverty level • Need subsidized housing • Staffing issues and wait lists • Transportation challenges • Homestead exemption awareness improvement • Awareness before point of crisis
• Community Partners	• Strong engagement of grantees, contractors, Age-Friendly Partners, sponsors, funders, community groups • Expanded partnerships with public and private organizations to expand capacity w/o costs +		
• Cultural/Social Trends	• County growth ->2040 • Ability to impact wellness, self-care through active engagement	• Need awareness of cultural differences- language, religion, values, and attitudes • Rates of disability and functionality for homecare	• Wealth/income disparity, managing needs of those who can contribute to cost and those who cannot • Housing costs rising • Service/awareness challenging for new, transitory residents • Meeting varied needs with county (i.e.-rural v. so. portion)
• Demographics/Technology	• Growth in total population and those aged 55+ • High % computers, smartphones internet	• Growth in Asian and Hispanic communities	• Growth in total population and those aged 55+
• Economic/Financial Factors	• No debt, available reserves • Operations and IT great • Stock market good • Opportunity for other revenue streams	• Changes in federal, state, and local government policy and compliance such as FML • Cheshire lease expires in 2025 • May need increased levy $	• Inflation, leasing, CPI rising • Staffing turnover, shortages; volunteer pool not all returning • Property/plant/equipment • Increased cost secondary to workforce issues
• Legal/Regulatory Considerations	• Opportunity to promote self-care, long-term planning, estate plans • Government benefits	• Educate differences between power of attorney and guardianship, • Estate administration	• Elder abuse, financial scams, self-neglect identification, management • Watch critical legislation • Unfunded mandates
• Political/Legislative	• Strong past support of SP levy	• Outcome of SP levy renewal • County commissioner relationships, political divisions	• Maintaining no waitlist is a challenge
• Delaware County Community Health Assessment & Improvement Plan (Adults 65+)	• SP focus areas align with State Health Improvement Plan- mental health, addiction, chronic disease • Check-ups in past year +	• Priority population 65+ • Half rate health status as excellent/very good • Over half mammograms 40+, PSA 50+	• Over half diagnosed – high blood pressure, high cholesterol, arthritis, limited in some way, overweight and obesity • Life expectancy declined
• Ohio State Plan on Aging	• SP alignment with this plan: access to information and advocacy services, age in place, population health, civic engagement, caregiving	• Focus on issues- independence, safety, health, wellness • Funding for this plan still pending	• Need to increase the capacity of the workforce that supports older adults
• Central Ohio Regional Mobility Plan	• Delaware County has a mobility manager.	• Need to expand services for disadvantaged populations, encourage flexible policies, increase awareness	• 20+% report public transportation not available where they live, 35% do not know options or eligibility
• Vendors	• Expanded HCBS options covered by health insurance	• Home care is top user of vendor services • ODH licensing of non-medical home care- new requirements	• Worker shortages • Limits on SP due to cost; client ability to afford copays/impact on sliding fee scale