

**MADISON SENIOR CENTER**  
**Strategic Operational Plan**                      **January - June 2015**

<b>GOALS</b>	<b>ACCOMPLISHMENTS</b>
<b>Administration</b>	
1. Prepare 2014 Annual Report for distribution. Complete monthly reports and end-of-year financial reports, develop 2014 donor posters; file and store year-end documents and data.	Annual Report completed and distributed. 2014 Monthly reports completed. 2014 documentation filed. 2014 donor posters completed.
2. Complete YTD financial reports for Foundation and grants. Prepare program expenditure reports. Renew all space contracts. Coordinate with City Finance to place “carryover” funds from previous years and Oasis grant in appropriate accounts.	Completed Foundation financial reports. Renewed space contracts for ongoing events. City returned \$12,437.63 directly to Foundation from 2012 -2014 balances. Clarified status of OASIS monies are in roll-over “grant” funds. Policy & Procedures Handbook revised and newcomer packets assembled.
3. Adjust to new software systems, including MUNIS, RecTrac, Donorworks. Learn and update processes for payroll, personnel actions, PO/requisitions, invoices, transfers, purchasing card, cashiering, general ledger. Utilize RecTrac for participant and program reports, implementing new Rental booking procedures. Train staff on Employee Self Service system. Explore Donorworks to export options for print.	All staff learning RecTrac and MUNIS systems. RecTrac procedures and instructions developed and programs entered. Using Tyler cashiering system. Monthly reports developed, using RecTrac info. Investigated Xerlith costs for additional mailing services. Staff training others on system.
4. Enter 2015 programs in RecTrak and develop campaign (signage, prizes, raffle) to encourage participant use. <b>RECORDS &amp; REPORTS 1, EVALUATION 4</b>	Programs entered. Staff will plan sign-in campaign in Fall. Clerk/Typist to compare participant counts with RecTrac.
5. Hire and train new Clerk/Typist 1 and prepare for the retirement of the Program Coordinator with manual, organized materials and training regime.	New staff installed, oriented and trained. Clerk/Typist trained on volunteer roles and supervision. Mailing procedures explained.
6. Develop Advisory Council and Foundation membership and leadership.	4 Foundation Board members recruited.
7. Maintain membership in Dane County Administrators of Volunteer Services; WI Assoc of Sr Ctrs; Elderly Services Network; SAIL; NCOA; ASA; Rotary Club	SAIL, ASA, Rotary Club, DCAVS, Elderly Services Network memberships maintained. WASC and Kiwanis considered
<b>Program</b>	
8. Focus <b>CATCH HH</b> programs in community areas of need based upon diversity and socio-economic factors. Expand partnerships and serve new locations.	Launched “Healthy Habits for Adults” program with 3 sessions at West Side Senior Center serving 53 adults. Met 6 month OASIS goals, including serving 108 children utilizing 31 adult volunteers in 4 locations.
9. Coordinate Madison Senior Coalitions <b>Sixth Grade Essay</b> Contest (4 Coalitions and 8 Middle Schools) culminating in May reception. Facilitate <b>Elder Wisdom Circle</b> , gather advice of 4-6 elders to reply to six online questions monthly. Engage 13 senior volunteers in <b>Dialogue Across Ages</b> and plan recognition for them. Maintain <b>St. James Preschool Program</b> with	6 <sup>TH</sup> Grade Essay event featured Dr. Cheatham with 70 attendees. Over 800 students in 8 school participated. Elder Wisdom added 4 members. 16 volunteers recruited for preschool program and 13 for Dialogue.

15 volunteers	
10. Seek and develop new Intergenerational Programs, perhaps with the Madison School District in the elementary grades.	Exploring multiple options. Kennedy Heights group coming.
11. Promote <b>Meet the Author</b> program and recruit future authors.	Authors secured with partnership with Central Library.
12. Strengthen partnerships including <b>Monona Terrace</b> Wellness Lecture (4/29 <i>Top 5 Fad Diets: The Good, the Bad, and the Ugly</i> ); <b>Outreach LGBT Senior Alliance</b> (1/15 social and full annual calendar); new partnership with <b>SAIL</b> (1/15 <i>Tying Scarves</i> , 2/24 <i>Mary Todd Lincoln (2-24)</i> and 5/13 <i>SAIL into Summer with Color</i> ) and <b>Central Library</b> ( <i>Ballroom Basics for Balance class in Feb</i> )	Health and Wellness lecture at Monona Terrace attended by 40. City Channel taped event. Dr. Shilagh Mirgain identified as spring speaker. Secured Visiting Angels as \$500 sponsor and seeking 2 <sup>nd</sup> promotional sponsor. LGBT had a January social and other programs. SAIL partnership offered suggested programs. Free Ballroom Basics for Balance offered (2/20) at Central Library.
13. Develop 2015 calendar and implement special program events: Li Chiao-Ping Dance Series 1/29 – 3/19; AARP Taxes, 7 sessions; VFW Dinner (Partner w/Gaylord's) and free Concert at 7 pm; <b>New:</b> Valentine Songs with Rob Rasch, sponsored by Visiting Angels; <b>New:</b> Prairie Bayou Cajun Band; Mardi Gras 2/17; <b>Broadway, The Golden Age</b> 3/31; Annual Meeting 4/9; Artful Affair: April 28 – May 31 with Gallery Night 5/1; <b>Top 5 Fad Diets</b> , 4/29 at Monona Terrace; Sixth Grade Essay Contest Reception, 5/6; Wingra Quintet Performs Monday 5/11	All events and programs offered as scheduled.
14. Organize contacts and develop plan for Health & Resource Fair 5/10	Exhibitors & Screeners full to capacity. Funds nearly match last year's revenue. Updated and organized contacts.
15. Promote new educational UW-HEX scholar program, compiling <b>A People's History of Medicine</b> , weekly sessions for Feb/Mar.	Completed as scheduled.
16. Work with other neighborhood and/or senior centers to identify /provide professional staff training/technical assistance in Spring. Utilize colleagues (Senior Planners & Continuity of Care network group) for information on new classes, speakers, qualified instructors, entertainment, and implement new program trends.	On-going; new Program Coordinator to meet with groups including WASC and Senior Planners.
17. Maintain & strengthen diversity in programs and activities. Seek additional computer and other class instructors and program lecturers. Plan monthly wellness programs at 12:15 to attract workers. <b>PROGRAM 9.</b>	Volunteer will continue research on museums offering BEAM tours. Coordinated trials with San Diego Museum of Art (unsuccessful) and San Diego Air and Space Museum (successful). Added Tuesday drop-in Computer Class with Gil; attendance good.
18. Promote <b>basic drawing and watercolor classes</b> . New <b>financial series</b> with Summit Credit Union. Volunteer offers ongoing <b>computer and Internet classes</b> . <b>Wellness lectures</b> in a series from Agrace Hospice, the Wellness Champions, SouthernCare and Home Health United.	Watercolor & Drawing classes in Jan/ Feb, Financial Series scheduled for Aug/Sept. Wellness lectures; one wellness topic presented each month. Received new (older) computers in lab from IT and reinstalling Microsoft Office. Put extra screens from lab on staff desks for dual monitoring. Purchased new lab cart.
<b>Promotion/Marketing</b>	
19. Collaborate w/Madison Senior Coalitions for program promotion citywide. Implement publicity plan, and investigate low-cost ways to promote the Senior Center. Use city-wide email for appropriate activities and expand use	Every month program highlights emailed to the Coalitions, sent out to all city employees, activities are promoted on the city's website. CATCH Healthy Habits was featured in Mayor Soglin's blog twice in this period and

of new city promotional links (events, news releases, core events, highlights). Communicate one-on-one with selected publications and editors (Brava, Mad Magazine), especially key programs 3 months prior. <b>Progrm 5.</b>	created a Facebook page. Marketing volunteer placed to develop posters, promotion, advertising and special events.
20. Maintain the quality of <i>THE MESSENGER</i> newsletter; plan topics strategically with existing features, add themes and special seasonal entertainment.	Clerk/Typist proofreads monthly newsletters, updates mailing list and does mailing. July newsletter produced by Interg Coor.
<b>21.</b> Enhance and maintain website with updated Photo Gallery (credit photos) and add Corporate Sponsors. Highlight sponsors in all advertising and promotion. <b>Fiscal 4</b>	Meeting with webmaster in July; AASPIRE interns working on project.
22. Complete videos of H&R, Photo Affair and Tea for website. Inquire about taping MT lecture. <b>Records &amp; Reports 2?</b>	City Channel estimated timeline moved back from March to unknown for the Tea, H&R Fair, and Photo Affair videos. New aerial photos need special camera.
<b>Volunteer Program/ Recognition</b>	
23. Develop monthly newsletter copy for the Volunteer and Donor page. Maintain volunteer bulletin board; maintain Volunteer Program component of website (update bi-monthly); maintain email link to website; update VolunteerYourTime.org website in January, March and May.	Newsletter copy developed. Bulletin board updated in Jan, Mar and May. Writing articles for next months. Adding Volunteer portion to the Website. Use VolunteerMatch.com and VolunteerYourTime.org.
<b>24.</b> Provide a comprehensive background check for volunteers that work with youth or at risk populations and are not directly supervised.	Policy in place; need middle initials for all background checks.
25. Build joint efforts between intergenerational and other volunteer activities. Recruit cooperatively, refer candidates, plan joint recognitions and share resources.	Recruited for Elder Wisdom (3); Preschool (1); CATCH (?); Sent out recruitment notices in mass emails to volunteers. Invited CATCH to attend April 9 <sup>th</sup> breakfast.
26. Facilitate Advisory Council's planning of Annual Meeting/Recognition Breakfast.	Recruited Donna Danowski, and Diane Hughes to join.
27. Promote and implement 2015 Volunteer/Donor Recognition Plan. Send February "Valentines" card; produce annual meeting/recognition breakfast in April; send birthday cards; "3 a month" thank you cards or email; <i>An Artful Affair</i> Reception; Summer Picnic on August 9. Promote membership and use of Dane County TimeBank to volunteers	Valentines cards sent; Bday cards sent; Artful Affair reception held. Nominated Jane Qualle for United Way Community Volunteer Award and attended luncheon. Thank you notes sent to CATCH HH and Interg volunteers; all are integrated into program.
28. Participate in Overture ticket program; identify interested volunteers and distribute tickets.	Worked with volunteer to identify interested folks. Developed plan for distribution based on low income status and volunteer requests.
29. Recruit volunteers for Edgewood Nursing Program, Evaluate Preschool Craft Program in June. Recruit judges and hangers for An Artful Affair. Work with Gardening Team to create and implement planting plan in May	Edgewood Nursing (25). Artful Affair executed with good to excellent survey results. Garden planted and watering ongoing
30. Recruit team leaders for 6 <sup>th</sup> Grade Essay Contest, Summer Picnic and Garden projects. Identify TL positions and promote.	Garden TL identified; Mark St. Francis/Cathy Conrad. FOW TL recruited and attending meetings.
31. Recruit and train a UW group to take on a special project, like a research study, cleaning out closets, gardening day.	No special project, however, recruited a maintenance volunteer to fix/update various projects.
32. Recruit 3 volunteers for committee to plan and execute Summer Picnic	Coalition volunteers assigned.
33. Utilize RecTrac system for accurate monthly reports; train a volunteer(s) to	Trained vols on tracking volunteer hours for monthly reports.

capture volunteer's hours.	
34. Send out Volunteer E-Newsletter twice a month with important news, opportunities, and recognition.	Sent twice each month, includes promotion of programs to volunteers.
35. Hold quarterly training and information meetings with front desk volunteers. Update new front desk training protocols including new RecTrac system and establish liaison with new Clerk Typist on responsibilities.	Held in January. RecTrac protocols added to training manual.
<b>Resource Development</b>	
36. Identify potential corporate sponsors and supporters/donors for events. Seek to build relationships with potential partners and transfer liaison with sponsors. Expand Health & Resource Fair Sponsors. <b>FISCAL 4.</b>	Program Coordinator developed program; now transferred as assignment to Volunteer Coordinator, who is meeting partners. Recruiting for H&R fair. Summer donor matching campaign developed with letter requesting match of \$5,000 gift.
37. Write and submit grant/donations requests. Seek a volunteer to assemble a database of grants, deadlines and genres.	AASPIRE Interns have completed.
38. Coordinate, write and publish spring edition of <i>Giving Matters</i> newsletter	<i>Giving Manners</i> distributed in March.
39. Seek new funding resources for CATCH HH, build connections, develop options and decrease costs.	OASIS grant funds end 8/31/15 from Anthem Blue Cross and Blue Shield. Presentation made at the Healthy Classrooms Symposium; a partner in the REAP Food Group Family Food Fest, and a partner of the Childhood Obesity Prevention Collaborative. Donated food reduces costs.
40. Meet with and submit proposals to a min of three new businesses in 2015. <b>(COMM CONNECTIONS 2,4; FISCAL 3)</b>	Marquette Neighborhood Association; Heritage; Villa Healthcare
<b>Facility</b>	
41. Plan meeting(s) with Attendants. Generate info showing different setup styles.	Met with each attendant and offered updates on RecTrac and other issues.
42. Get estimates for wood floor refinishing and for cleaning grease out of kitchen hood/vents	Sought multiple estimates for floor; using different contractor in August. Received good estimate for kitchen hood/vents project in April. New baffled filters purchased that block flames and are easily cleaned.
<b>Other</b>	
43. Support the CDD Funding Process study and implementation plan. Plan for 2016 senior adult services RFP. Develop Senior Services plan, indicators of success, criteria for review, application. Confer 2X monthly with CDD Managers.	
44. Facility efforts: Courtyard tall poles got new LED tops. Lower lights planned and purchased. Communicated with all stakeholders about project and corroded wiring problem. Coordinated stump removal in courtyard and got two AEDs installed.	