

**MADISON SENIOR CENTER**  
**Strategic Operational Plan**                      **JULY - DECEMBER 2013**

**GOALS**

**ACCOMPLISHMENTS**

**Administration**

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| <p>1. Develop simple one-page written agreement for senior groups or one-time collaborations; seek approval by City Attorney and Risk Manager</p>                                                                                                                                                                                                                                 | <p>City Attorney will advise on agreement language.</p>                                                                                                                                                                                                                                                                                        |
| <p>2. Prepare information for CDD budget submittal. Determine needed adjustments to 2013 budget line items, and advocate for additional 2014 resources. Seek 2012 Partnership Fund carry-over adjustment with Finance Dept. <b>FISCAL &amp; ASSET 2</b></p>                                                                                                                       | <p>CDD budget materials submitted; adjusted 2013 hourly wages to expand Clerk/Typist to Friday AM. Continuing conversations with CDD financial staff and new Finance Dept. staff.</p>                                                                                                                                                          |
| <p>3. Review and update Policy Manual, including needed whistleblower policy.</p>                                                                                                                                                                                                                                                                                                 | <p>Whistleblower policy completed for senior center, but not approved by City Attorney or City Council. Updated fire alarm policy.</p>                                                                                                                                                                                                         |
| <p>4. Develop uCount campaign (signage, prizes, raffle) to encourage participant use. <b>RECORDS &amp; REPORTS 1, EVALUATION 4</b></p>                                                                                                                                                                                                                                            | <p>Survey Monkey (online) and paper survey (in-house) completed. 99% program satisfaction. 91% feel that the senior center has improved their quality of life. "Sign-in" posters displayed in building.</p>                                                                                                                                    |
| <p>5. Maintain membership in Association of Fundraising Professionals, Madison Chapter; Dane County Administrators of Volunteer Services (program committee); WI Assoc of Sr Ctrs (newsletter editor); Elderly Services Network (Secretary); Literacy Network (Secretary); SAIL; NCOA/NISC., WI Coalition of Identity Theft, Program Planners Group, and Payroll Users Group.</p> | <p>All associations maintained. Staff arranged WASC conference speakers and edited quarterly newsletter; developed programs, prepared minutes. Serve on Advisory Council for Aging Network Volunteer Collaborative with n4a.</p>                                                                                                               |
| <p>6. Interview and develop appropriate projects for UW, Edgewood College, and MATC interns.</p>                                                                                                                                                                                                                                                                                  | <p>AASPIRE Intern developed Health &amp; Resource Fair database, produced ads and publicity. Provided appropriate evaluations for student and ASSPIRE interns. Developed internship for Edgewood College student.</p>                                                                                                                          |
| <p>7. Orient and train new Intergenerational Program Coordinator, especially with Elder Wisdom Circle (EWC), Dialogue Across the Ages (DAA), 6<sup>th</sup> Grade Essay Contest.</p>                                                                                                                                                                                              | <p>Trained on basic scheduling systems, volunteer database, and reviewed paper and electronic files. Developing a procedure manual for advertising/calendar listings. EWC - "Madison-Messengers respond to questions monthly; DAA-13 seniors paired with 12 students for four session. Essay Contest- 4 Coalitions and 8 schools enrolled.</p> |
| <p>8. Meet and exceed Oasis Grant reporting requirements and targets for CATCH Health Habits.</p>                                                                                                                                                                                                                                                                                 | <p>Five CATCH HH programs with 25 volunteers and 136 youngsters served.</p>                                                                                                                                                                                                                                                                    |
| <b>Program</b>                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                |
| <p>9. Develop events, classes, and programs. Implement 2<sup>ND</sup> Annual Health &amp; Resource Fair (9/12), Photo Affair (10/4), Festival of Wreaths (11/4-12/6), Classic English Tea (12/6), Come Together Party (12/7). <b>PROGRAM 1, 2</b></p>                                                                                                                             | <p>Table assignments made for Tea attendees. Wreath promo (20% discount) to City employees. <b>Health &amp; Resource Fair:</b> 200 attendees, 12 screeners, 3 presenters, 30 exhibitors; net profit: \$4,534! <b>Photo Affair;</b> over 50 photos from 17 Dane County photographers. <b>Festival of</b></p>                                    |

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|                                                                                                                                                                                                                                                                                                                                                                                                               | <p><b>Wreaths;</b> 43 Hand-crafted wreaths displayed; Fresh wreath profit \$610. <b>Classic English Tea:</b> 115 attendees, profit \$2,627. <b>Come Together:</b> rescheduled for March.</p>                                                                                                                                      |
| <p>10. Strengthen collaborations with partner organizations and senior groups to provide programs in off-site locations or new timeframes e.g., weekends and early evenings. Utilize colleagues for information on new classes, speakers, qualified instructors, entertainment, and implement new program trends. <b>PROGRAM 3,6</b></p>                                                                      | <p>Presented a Medicare program in evening with Outreach, Inc.. Wellness classes in nutrition and exercise generate 10-15 participants. Promoted Playtime Theater from Madison Opera (our new neighbor). Added adapted yoga (no charge) and monthly chair massage (minimal fee). <b>Of 2,900 programs, only 5% have fees!</b></p> |
| <p>11. Develop 2014 calendar and plan signature program events: Sunday @ the Center, Dinner and VFW Band Concert (March 20), Artful Affair on Gallery Night (5/2), Sixth Grade Essay Contest Reception (May 7), Summer Picnic (June 22), Health and Resource Fair (9/12), Photo Affair on Gallery Night (10/10), FOW (11/10-12/5) ,Classic English Tea (12/5).</p>                                            | <p>Major 2014 events are scheduled (see dates to left), exploring seasonal entertainment and primed for new opportunities.</p>                                                                                                                                                                                                    |
| <p>12. Seek program resources at Edgewood College and UW, especially nursing, audiology and pharmacy students and new opportunities with MMSD/MSCR, Overture Center, Monona Terrace, Central Library, YWCA and Madison Opera.</p>                                                                                                                                                                             | <p>Health and Resources Fair generated 50+ vendors, sponsors, partners and screeners.</p>                                                                                                                                                                                                                                         |
| <p>13. Seek out programs that expand efforts to a broad and diverse aging population. Strengthen diversity in offered programs and activities, including CATCH Healthy Habits. Use expertise of ethnic and cultural organizations and projects. Promote ‘Come Together Party,’ explore activities for working adults, support Cultural Diversity project and LGBT group activities. <b>PROGRAM 3,4,9.</b></p> | <p>Come Together Party rescheduled by NESCO Cultural Diversity project. Added quarterly LGBT socials; Gay &amp; Gray Discussion Group doubles to 18 participants. Developed noon time wellness classes for working adults. Seeking more diversity in CATCH volunteer base to match high diversity in those served.</p>            |
| <p>14. Work with neighborhood and/or senior centers to identify and provide professional staff training/technical assistance. Explore opportunities for CEUs in health, occupational therapy, and advocacy <b>PROGRAM 6.</b></p>                                                                                                                                                                              | <p>Offered Stress Management class by participant Dr. Frank Stein with 10 attendees.</p>                                                                                                                                                                                                                                          |
| <p>15. Schedule 3 CATCH programs, seeking new locations. Develop winter 2014 programs.</p>                                                                                                                                                                                                                                                                                                                    | <p>Program scheduled starts 12/13 with additional winter/spring 2014 programs. Developing new partnerships and locations.</p>                                                                                                                                                                                                     |
| <p>16. Develop program series with identified partners, focused on wellness and money management. Investigate programs for those with hearing/sight difficulties and those living in isolation.</p>                                                                                                                                                                                                           | <p>Mindfulness Based Stress Reduction classes. Monthly finance classes on estates, wills, power-of-attorney, etc. Memory screenings provided by Dean Foundation and medication checks with Walgreens. Monthly wellness series with various health professionals.</p>                                                              |
| <p>17. Implement Leck Grant project, “Training for Computer Lab Volunteers”, meeting grant requirements.</p>                                                                                                                                                                                                                                                                                                  | <p>Instructor developed training manual for county senior center computer labs and trained 10 computer volunteers.</p>                                                                                                                                                                                                            |
| <p><b>Promotion/Marketing</b></p>                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                   |

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| 18. Plan exclusive Metro Place social event and/or special event for corporate donors. <b>PURPOSE AND PLANNING #4</b>                                                                                                                                                                                                                                                                                                  | Provided space for Metro Place Holiday event with 40 residents. Corporate donors provided with special Tea tables, and sponsors received priority booth space at Health and Resource Fair.                                                                                                                                                                                                                          |
| 19. Coordinate promotion efforts in several selected Madison neighborhoods in their newsletters/websites.                                                                                                                                                                                                                                                                                                              | Received coverage in Downtown Dialogue and Goodman Eastside News. Ads placed in Northside & Eastside News, Calendar 77 (WSJ) and online regional calendars. Developed neighborhood listings and two contacts made.                                                                                                                                                                                                  |
| 20. Explore opportunities with Monona Terrace, to sponsor appropriate senior-related activity and/or event. <b>COMMUNITY CONNECTIONS #4 &amp; PROGRAM DEVELOPMENT #7</b>                                                                                                                                                                                                                                               | Meetings with Monona Terrace to design mutually beneficial older adult event. Utilize MT Lecture Hall for a "Health and Wellness Series" presentation of 1.5 hours in September or October.                                                                                                                                                                                                                         |
| 21. Collaborate w/Madison Senior Coalitions for program promotion citywide. Implement publicity plan, and investigate low-cost promotions. Use city-wide email for appropriate activities. Add regular notices to AAA and ADRC. Communicate one-on-one with selected publications and editors, especially key programs 3 months prior. <b>PROGRAM 5.</b>                                                               | Send monthly information and post classes on multiple online calendars. Promote Wellness classes to AAA's Caregiver Newsletter, and all news to Downtown Dialogue, UW Sifter, and PLATO. Continuity of Care email list added to promotional venues; noted additional attendees at classes and the Tea.                                                                                                              |
| 22. Maintain the quality of <b>THE MESSENGER</b> newsletter; plan topics strategically with existing features like the Front Page, Volunteer Spotlight, Donor Page, CATCH HH article.                                                                                                                                                                                                                                  | Compliments received regularly on <i>The Messenger</i> . CATCH HH article, Volunteer Spotlight, and Donor articles planned and contributed by appropriate staffers.                                                                                                                                                                                                                                                 |
| 23. Enhance and maintain website with updated Photo Gallery. Update links and keep materials current. Highlight corporate sponsors in all advertising and promotion. <b>FISCAL 4</b>                                                                                                                                                                                                                                   | City Channel took additional pictures of senior center rooms and staff developed a script with picture sequence. New city website system required training of staff for optimum use. Photo Gallery/Flicker updated.                                                                                                                                                                                                 |
| 24. Market CATCH HH in targeted neighborhoods, attract existing populations, and use social networking for volunteer recruitment. Seek television or newspaper coverage, utilizing Oasis PR resources.                                                                                                                                                                                                                 | Coordinated professional taping for CATCH Healthy Habits promo video. Focused on neighborhood recruitment by program site with website recruitment and small press ads as primary tools..                                                                                                                                                                                                                           |
| <b>Volunteer Program/ Recognition</b>                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 25. Develop recruitment strategies using available sources including newsletter, volunteer bulletin board, personal contacts, website, RSVP, <a href="http://VolunteerYourTime.org">VolunteerYourTime.org</a> (VYT) and TimeBank (TB) websites. Recruit and refer CATCH HH volunteers. Utilize trained volunteers to promote program at the UW volunteer fair (September) and Aging Colloquium (Oct), and other fairs. | 4 CATCH HH volunteers referred. Volgistics database used to recruit Front Desk volunteers and invite to FOW Reception. Call lists generated for garden volunteers. Updated VYT 5 times and TB twice. Staffed MSC exhibit @ UW student volunteer fair (16 prospects contacted) and at UW Aging Colloquium. Recruited volunteers for Health Fair (15), for Photo Affair (17), FOW (16), and Classic English Tea (30). |
| 26. Participate in United Way's Days of Caring; develop group volunteer projects and implement. Organize other group projects, as identified.                                                                                                                                                                                                                                                                          | 16 volunteers from GE Medical, CUNA and Stafford Law Office painted patio tables and chairs and stained wooden benches in courtyard.                                                                                                                                                                                                                                                                                |
| 27. Lead and organize the Holiday Meal, recruiting volunteers and making meal arrangements.                                                                                                                                                                                                                                                                                                                            | 25 volunteers recruited; 76 guests registered.                                                                                                                                                                                                                                                                                                                                                                      |
| 28. Institute a recruitment campaign for Front Desk volunteers through all methods, including direct contact, to eliminate empty positions and                                                                                                                                                                                                                                                                         | Promoted through VolunteerYourTime.org; UW Volunteer Fair; RSVP; TimeBank; and direct contact with 10 volunteers.                                                                                                                                                                                                                                                                                                   |

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| create a substitute listing.                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                  |
| 29. Obtain an accurate record of volunteer hours using uCount System; identify and survey “inactive” volunteers to determine their status; update Volgistics data base and hours of off-site volunteers.                                                                                                                                        | Key volunteer continues use of manual spreadsheet to gather accurate count of volunteers and their hours.                                                                                                                                                                        |
| 30. Recruit volunteers for Edgewood Nursing program, Preschool Craft program, ‘A Photo Affair’ judges and hangers, and gardening team for courtyard/patio fall cleanup.                                                                                                                                                                         | Recruited 46 volunteers for Edgewood College, 16 (3 new) for Preschool Craft, 17 for Photo Affair.                                                                                                                                                                               |
| 31. Implement 2013 recognition plan activities, artist’s reception (10/4), FOW reception (11/15) and Holiday Tea (12/6). Utilize the Overture ticket program for interested volunteers. Plan CATCH Healthy Habits recognition event. Promote membership in Dane County TimeBank. Develop 2014 Volunteer Recognition Plan with Advisory Council. | Photo Affair Artist Reception held; FOW Reception (only 7 attended). Eleven volunteers received 21 Overture vouches. Feedback sessions at coffee shop recognized CATCH volunteers, and 15 gift cards distributed.. 2014 Volunteer Recognition Plan developed w/Advisory Council. |
| 32. Complete Census project with appropriate volunteer or student.                                                                                                                                                                                                                                                                              | No volunteer or students found.                                                                                                                                                                                                                                                  |
| <b>Resource Development</b>                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                  |
| 33. Identify potential corporate sponsors and program supporters/donorsforevents, like Health & Resource Fair and Photo Affair. Build relationships with potential partners. <b>FISCAL 4.</b>                                                                                                                                                   | <b>Health &amp; Resource Fair</b> doubled to 200 participants. New sponsors added; GHC, HHU, BrightStar, and Oak Park Place at \$5,000. <b>Classic English Tea:</b> new sponsor Oakwood at \$200 with most foodstuffs donated.                                                   |
| 34. Build CATCH HH funding network in anticipation of less 2015 Oasis funding.                                                                                                                                                                                                                                                                  | Submitted Rotary Grant to support CATCH HH.                                                                                                                                                                                                                                      |
| 35. Write and submit grant requests to Kiwanis West and Downtown, Rotary Club and proposal for AFP student group fundraising assistance, and other funding sources                                                                                                                                                                              | Downtown Rotary and CVS grants submitted. Requested advocacy workshop support from Kiwanis Downtown (not funded).                                                                                                                                                                |
| 36. Develop and plan a Spring 2014 fund raising event. Assess fundraising program goals and methods with Foundation Board. Develop fund raising efforts, special events.                                                                                                                                                                        | Met with new Baird representative on behalf of the Senior Center Foundation; completed investment changes directed by Board. Discussed info session with targeted top donors.                                                                                                    |
| 37. Coordinate, write and distribute <i>Giving Matters</i> newsletter, focusing on 30 <sup>th</sup> Anniversary.                                                                                                                                                                                                                                | <i>Giving Matters</i> mailed to 1,750 in October with 11 volunteer mailers.                                                                                                                                                                                                      |
| 38. Organize Festival of Wreaths; promote event and recruit wreaths for display. Plan and implement the Classic English Tea.                                                                                                                                                                                                                    | Fresh wreath: \$610 profit. Classic English Tea attendance at 115 with \$2,627 profit. Artificial wreaths: \$298.                                                                                                                                                                |
| 39. Write and distribute August donor letter, focusing on 30 <sup>th</sup> Anniversary.                                                                                                                                                                                                                                                         | Mailed 500 letters, estimated \$2,160 raised from 35 donors.                                                                                                                                                                                                                     |
| 40. Recruit volunteers and organize Holiday Meal on 12/25                                                                                                                                                                                                                                                                                       | Coordinated w/ SMCE. Recruited 27 volunteers. Solicitation letters sent to 8 downtown churches. Total cost: \$385.                                                                                                                                                               |
| <b>Facility</b>                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                  |
| 41. Complete renovation projects to utilize available capitol funding by                                                                                                                                                                                                                                                                        | Coordinated projects: elevator interior, PA & security camera with fiber -                                                                                                                                                                                                       |

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| October 1 <sup>ST</sup> . Add vestibule, front entrance, painting, landscaping, security, new water heater. <b>FACILITY &amp; OPERATIONS 4</b> | work system, front landscaping and benches/receptacle, Craft/Exterior lighting, and painting/pressure wash/seal on front driveway. Recover Craft sinks, counters, and baseboards, install Slatwall display, Front Desk signage, Lounge window sill and windows, Vestibule wall/door, electro-static paint on 2 doors, cornerguards, window shades, Dyson driers, chairs w/ arms; mity-lite tables; armoire door replacement, extra tile, mats; new coat rack. patio umbrellas/covers bathroom valves, CATCH storage shelf. |
| 42. Refinish Diningroom wood floor in August.                                                                                                  | Wood floor was successfully resealed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Custodian trained in emergency lighting inspection.                                                                                            | Not completed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

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| <b>Other</b>                                                                 |                                                                                                                                                                                                                                                                                                                       |
| 43. Hiring processes completed.                                              | Intergenerational Coordinator and Attendant hired and processed.                                                                                                                                                                                                                                                      |
| 44. Senior Services, Case Management Contracts                               | Studied impact of Dane County formula changes for contracted Coalition services and sought out Forward Community Investments as a resource to Coalitions. Prepare 2014 senior services contracts                                                                                                                      |
| 45. Training Accomplished                                                    | LGBT Health Issues. Harassment training. Collaborate on PowerUp training and promotion. Complete Kodiak, Alaska, national peer review on-site and report. National Senior Center conference in MA; prepared two presentations. Provided national webinar for n4a and submitted abstracts for ASA and n4a conferences. |
| 46. Advocate for additional Senior Center staffing. Assess work environment. | Prepare response to Mayor to advocate for additional staffing. Advocate with CDD to adjust hourly salaries to expand hours of Clerk/Typist. Interview students, interns, and staff with HR assistance. Meet with Mayor's team on Citywide behavioral policy.                                                          |
| 47. Foundation Financials                                                    | Processed and tracked cash and in-kind donations from sponsors and other donors for Foundation. Coordinated thank you notes and input to DonorWorks.                                                                                                                                                                  |
| 48. Participant Survey EVALUATION 2, 4.                                      | Implement in house and Survey Monkey Participant evaluation in August; Requested suggestions for educational and wellness classes.                                                                                                                                                                                    |