Strategic Plan for 2021 – 2023
Approved on April 26 2021
# Table of Contents

- **Introduction** 3
- **Executive Summary** 4
- **Mission** 5
- **Finance** 6
- **Marketing and Community Outreach** 7
  - Marketing Activities 7
  - Community Outreach Activities 7
- **Fund Development** 9
- **Programs** 10
- **Special Events** 11
Introduction

For over 40 years, Senior Coastsiders has provided opportunities, support and resources for older adults and their caregivers on the San Mateo County coast. We promote successful aging by creating an environment for Coastside seniors that meets their needs, enriches their lives and respects their creativity, dignity and value.

For our organization to remain relevant, continue to grow and be adaptable to changing circumstances, it is essential that we regularly engage in strategic planning. The Board of Directors of Senior Coastsiders recognizes that strategic planning can assist our organization by:

- Bringing clarity and agreement on our mission, vision and direction
- Aligning the board and staff
- Helping us prepare for an uncertain future
- Improving our decision-making processes so that short-term decisions are based on long-term implications
- Helping us prioritize the work to be done
- Helping us anticipate and manage change
- Promoting effective stewardship
- Identifying existing strengths in our organization
- Providing an opportunity to analyze our organizational systems and processes

This strategic plan provides a road map for our internal operations, external relationships and the fund development necessary to accomplish our goals.

Together with our donors, participants, supporters, and partners we look forward to playing a leading role in ensuring that all older adults in our community have the support and resources necessary to age successfully.

Sandra J Winter, PhD, MHA

---

1 From "Driving Strategic Planning: A Nonprofit Executive’s Guide" By Sue Waechter.
Executive Summary

This three-year strategic plan describes the goals, deliverables and actions we will pursue to achieve our mission. The plan will be regularly reviewed and updated so that it remains useful in a world that is volatile, uncertain, complex and ambiguous.

The strategic planning process took place at regular intervals over the course of a year and included input from board and staff members. Early in the process key strategic planning themes were identified, including marketing, fund development, community relationships, organizational image, programs and special events. In small group meetings, goals and actions were developed for each of these themes, which were later consolidated into our strategic plan.

In summary, our plan for the next three years is to:

- Ensure Senior Coastsiders has the financial resources it needs to provide programs and services to our community. Provide financial analysis, advice, and oversight of the Senior Coastsiders budget.
- Develop strategies to engage with our community and encourage investment in our organizational mission. Support the fundraising activities of the organization.
- Strategically align Senior Coastsiders with other organizations on the Coast to maximize the value we provide to the senior population.
- Increase awareness and understanding among Coastside residents of the services and value that Senior Coastsiders provides.
- Implement fund-development infrastructure and processes to ensure the income of Senior Coastsiders is sufficient to meet anticipated financial, organizational and operational growth.
- Ensure that Senior Coastsiders is providing programs that address the interests and needs of a changing senior Coastside community and that are attractive to the largest possible audience.
- Strategically conduct special events to maximize outreach and community awareness of Senior Coastsiders’ programs and mission.

Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.

Margaret Mead
Mission

**Mission:** Senior Coastsiders provides opportunities, support and resources for older adults and adults with disabilities living on the Coastside, from Montara to Pescadero and Skyline to the Sea. We strive to celebrate the value of seniors and act as a community resource for information, caregiver support and innovative approaches to successful aging.

Senior Coastsiders promotes healthy aging by providing opportunities, support and resources for older adults and their caregivers from Montara to Pescadero and Skyline to the Sea. We create an environment for Coastside seniors that meets their needs, enriches their lives and respects their creativity, dignity and value.
FINANCE

GOAL 1: Ensure Senior Coastsiders has the financial resources it needs to provide programs and services to our community. Provide financial analysis, advice, and oversight of the Senior Coastsiders budget.

DELIVERABLE 1: Update growth forecasts and financial requirements for the next 3 years

- Action 1 - Review program and resource requirements to ensure appropriate budgeting.
- Action 2 - Review fund development targets for annual operating budget.
- Action 3 - Determine if long-term development targets align with projected operating and program costs, to ensure we meet strategic goals.
- Action 4 - Document the dollar value of the services that we provide on an annual basis
- Action 5 - Develop Key Performance Indicators for tangible and intangible services
MARKETING AND COMMUNITY OUTREACH

Marketing Activities

GOAL 1: Develop strategies to engage with our community and encourage investment in our organizational mission. Support the fundraising activities of the organization.

DELIVERABLE 1-1: Create, implement and maintain a comprehensive marketing plan

- Action 1 - Create a marketing plan that includes a multi-media marketing strategy, annual marketing calendar, marketing SWOT analysis and a realistic budget
- Action 2 – Develop and continually maintain and update appropriate donor-focused collateral to include new donor packets, major donor packets, an annual report, etc.
- Action 3 – Develop and continually maintain and update appropriate organizational promotion collateral to include an annual report, flyers, etc.
- Action 4 - Sell an Improved Future - Migrate messaging from selling past and current accomplishments to include and emphasize “future” programs, infrastructure, actions, services and advocacy we intend to initiate.

DELIVERABLE 1-2: Harness Relevant Expertise

- Action 1 - Recruit board members with expertise in marketing and community outreach
- Action 2 - Cultivate an “executive” volunteer force of individuals with appropriate skills to support marketing activities

Community Outreach Activities

Goal 1: Strategically align Senior Coastsiders with other organizations on the Coast to maximize the value we provide to the senior population.

DELIVERABLE 1-1: Continue to build and maintain solid relationships with other community organizations

- Action 1 - Identify organizations with which to build and maintain partnerships (e.g. other non-profits, other senior centers, City, County, businesses, community organizations).
- Action 2 - Identify the benefits to our community that partnering with other organizations will yield and develop goals to achieve these benefits.
- Action 3 - Cultivate and maintain consistent relationships with the leadership of other organizations on the coast and on the peninsula including for-profit and not-for-profit
organizations, communication groups (radio, newspaper, etc.), city and county government groups, etc.

Goal 2: Increase awareness and understanding among Coastside residents of the services and value that Senior Coastsiders provides

DELIVERABLE 2-1: Raise and maintain understanding and awareness among the Coastside population - including key players in local, city and state government - regarding the services and value that Senior Coastsiders provides and the role we play in the community

- Action 1 - Conduct surveys, focus groups and various forms of market research to identify gaps in awareness/understanding of who we are and what we do across our entire coverage area
- Action 2 - Determine local activities that the staff, Board, volunteers and older adults themselves can pursue to help raise awareness regarding the value that Senior Coastsiders provides. A grass roots activity.

DELIVERABLE 2-2 Maintain awareness and understanding among key players in local, city and state government regarding the services and value that Senior Coastsiders provides

- Action 1 – Continue to educate new City and County council members and staff and State representatives about the services and value that Senior Coastsiders provides.

DELIVERABLE 2-3: Make Senior Coastsiders the “go-to” resource for older adults and their families and caregivers on the San Mateo Coast

- Action 1 – Continue to serve as an up-to-date and relevant knowledge center for older adults and their families
- Action 2 – Assume leadership roles in the community and county in matters regarding older adults, for example, lead an Age Friendly initiative with City staff
FUND DEVELOPMENT

GOAL 1: Implement fund-development infrastructure and processes to ensure the income of Senior Coastsiders is sufficient to meet anticipated financial, organizational and operational growth.

DELIVERABLE 1-1: Identify diverse funding streams and appropriate strategies to obtain, retain and grow our income

Income Risk Management

- Action 1 – Develop a comprehensive risk management plan for all streams of funding (government, donations, campaigns, special events and appeals)

Donor Stewardship

- Action 1 - Develop a process to regularly communicate with major donors
- Action 2 - Create a stewardship plan for small and medium donors to maximize donor retention
- Action 3 – Build a planned giving program that includes professionally created collateral, advanced estate management offerings like Charitable Gift Annuities, educational materials about estate planning
- Action 4 – Develop a gift acceptance policy
- Action 5 – Update the endowment campaign with shorter term appeals building up to a 50th anniversary campaign in 2027

DELIVERABLE 1-2: Harness Relevant Fund Development Expertise

- Action 1 - Explore risks and benefits of hiring a dedicated fund-development position
- Action 2 – Explore creating an “executive” volunteer force to support development, grant-writing, etc. comprised of individuals with appropriate skills
PROGRAMS

Goal 1: Ensure that Senior Coastsiders is providing programs that address the interests and needs of a changing senior Coastside community and that are attractive to the largest possible audience

DELIVERABLE 1-1 Increase participant base by growing current program offerings

- Action 1 - Determine collaborative partnerships with organizations that offer complementary services, e.g., VOTC, the library, ALAS, Senior Housing Campus, Pacifica Senior Center
- Action 2 – Use a multi-pronged strategy to identify new program opportunities
- Action 3 – Extend intergenerational opportunities by inviting other organizations to attend classes and events
- Action 4 – Explore technology-based systems to improve center management efficiency, for example, class and meals/event scheduling
- Action 5 – Explore alternative transportation options to increase access to our programs, e.g. hiring buses for trips, buying a bus, sharing a bus with other organizations
- Action 6 – Empower and educate older adults on the coast, including current participants and volunteers, to become advocates who can initiate and support a variety of activities focused on seniors
- Action 7 - Enlist volunteers and current participants as ambassadors of Senior Coastsiders to promote our work to the larger community
SPECIAL EVENTS

Goal 1: Strategically conduct special events to maximize outreach and community awareness of Senior Coastsiders’ programs and mission

DELIVERABLE 1-1: Develop a special events calendar to maintain consistent presence on the Coastside

- Action 1 – Four plan and execute successful and relevant fundraising events per year that are clearly branded and recognized as supporting Senior Coastsiders
- Action 2 – Create special event calendar and timeline
- Action 3 - Consult with stakeholders/participants about special events and explore new ideas to ensure Senior Coastsiders stays relevant
- Action 4 - Improve brand recognition with more formal ties to fund-raising events of Taste of the Coast, Pumpkin Run and Senior’s Night Out to more directly associate “community connection” with Senior Coastsiders.

DELIVERABLE 1-2: Maximize the benefit to the organization of fundraising and community focused events

- Action 1 - Run cost benefit/ Return on Investment analysis of past three years of events taking into account both fund raising and non-monetary benefits
- Action 2 - Identify ways to increase revenue and/or reduce expense of events
- Action 3 – Create and expand a strategic sponsor partner program to target specific sponsors for specific events, including diversifying sponsor levels
- Action 4 - Micro fundraising within events, for example:
  - Pumpkin Run to include personal and team fundraising campaigns
  - Taste of the Coast - Raise the paddle or other specific fundraising goal
  - Home Repair - Competitive team fundraising for materials
  - Seniors Night Out - Raffle