

# SURREY STRATEGIC PLAN

## Reimagine Aging

September 2020



# Strategic Plan

## Mission, Vision & Core Values Strategies & Objectives



**“Someone’s sitting in the shade today  
because someone planted a tree a long time ago.”**

**Warren Buffett**

# Surrey – Next Gen

## PLANNING CONSTRUCT



# Mission & Vision

## Mission Statement

Surrey inspires and enables all of us, as we age, to live with independence and dignity, and as engaged members of the community.

## Vision Statement

Surrey will create the leading dynamic community for aging adults, by developing groundbreaking programs, services, and activities that encourage and support them to live well longer.

# Core Values

- **Compassion:** Surrey cares about and supports our community. We reach out, we listen, we spend time, and we act.
- **Community:** Surrey believes in neighbor helping neighbor, and volunteers are critical to all that we do. We believe connections of all kinds – among families and throughout the community, are critical to all of us as we age.
- **Access:** We strive to ensure that our services are available and affordable to all.
- **Respect:** We always recognize our community members' talent, experience, and gifts, and encourage choice and dignity at all times.
- **Inclusion:** We embrace people of all races, creeds, ethnicities, orientation and age and strive to create a community of equity, diversity and justice.
- **For Life:** Surrey is a resource for living. Our work helps create meaning, purpose, and joy for all of us as we get older.

# Strategy 1 – Health & Wellness (1)

## Strategy

To promote the physical, mental, and social health of older adults at all stages of the aging process through a continuum of health and wellness programs.

## Objectives

- 1. Continuum of Care & Services:** Create a “Continuum of Care” model that integrates at-home, virtual, and center-based programs, home care, and support services into a person-centered continuum of services – a CCRC without walls.
- 2. Nutritional Support:** Develop programs and approaches to address the nutritional needs of older adults that will be increasingly critical due to health regulations and economic challenges.
- 3. Mental Health Services:** Develop programs to address the needs of older adults with behavioral health and cognition issues including collaborative opportunities with other mental health providers and public sector organizations to increase access to these critical services.
- 4. Collaborative Health Services:** Assess the potential of collaborating with other organizations introduce additional health-related programs including mental health, physical therapy, podiatry, and other healthcare programs.

# Strategy 2 – Support & Assistance (1)

## Strategy

To help older adults live fully, productively, and safely through a continuum of home-based services to assist older adults of all ages, capabilities, socioeconomic and health status have the support and assistance they need to remain in their homes.

## Objectives

- 1. Home Care Services:** Expand Home Care services to address the growing need for home-based care to address increasing numbers of older adults leaving or not entering senior living facilities, including Housing Transition Programs, Assessment Services, Tele-health, and other support programs.
- 2. At-Home Program Packages:** Package programs as part of the continuum of care and services that support basic needs and activities of daily living including grocery shopping, chores, minor home repairs, personal financial services, transportation, cleaning, and a full range of Home Care services.
- 3. Surrey On Call:** Reestablish the popular Surrey On-Call program that offers personal support and assistance for older adults based on personal need assessments, ongoing monitoring and check-ins, and 24/7 intervention as need arises.
- 4. Family Support Programs:** Develop programs to support families who are responsible for the well-being of family members, now increased with the trend away from senior facilities, including expanded “At Home” Respite Care, Friendly Check-in Services, and greater levels of communication and interaction with family members.

# Strategy 3 – Engagement & Purpose (1)

## Strategy

To foster greater community engagement to provide for and support the needs of the older adult population

## Objectives

- 1. Expanded Volunteerism:** Define new opportunities for volunteers to provide support within the community setting including leadership of small groups, check-in services, household tasks, transportation and other activities.
- 2. Intergenerational Programs:** Promote intergenerational involvement, including the development of an Advisory Committee of young professionals that drive programs for the benefit of both older adults and youth, including tech support and other activities.
- 3. Surrey Academy:** Develop a workforce development program that reaches those who are economically challenged to provide job training in various aging-related jobs including home care providers, at-home support services, and other positions to both provide an opportunity for personal growth of the participant, and a pool of potential employees for various services.

# Strategy 4 – Innovation & Leadership (1)

## Strategy

To serve as a recognized leader and innovator in aging services, bringing together thought leaders, program excellence, and collaborative partners to advance and reframe perceptions of aging.

## Objectives

- 1. Virtual Programming.** Expand opportunities for participation and engagement through virtual programs and virtual networking which offers a wide range of educational, inspirational, health, and wellness programs, and establish training programs and a loaning library for devices to enable those economically challenged to participate.
- 2. The Beilenson Institute for Innovations in Aging.** The Institute will serve as a proving ground for the dissemination of evidence-based programs that have significant impact on the lives of older people. It will convene the best and the brightest in the aging field, create synergies with other top service providers, and position Surrey as a regional and national leader in aging services.
- 3. Collaborative Leadership:** Serve as a leader and innovator in the field of aging, collaborating with educational institutions, topic experts, nonprofit organizations, and public and private sector organizations serving older adults to advance new initiatives, changed perception and integrated networks to create greater impact and outcomes.

# Implementation Timeline

ACTIVITIES	FY21 1st Qtr.	FY21 2nd Qtr.	FY21 3rd Qtr.	FY21 4th Qtr.	FY22 1st Qtr.	FY22 2nd Qtr.	FY22 3rd Qtr.	FY22 4th Qtr.
<b>HEALTH AND WELLNESS</b>								
CONTINUUM OF CARE								
NUTRITIONAL SUPPORT								
MENTAL HEALTH SERVICES								
COLLABORATIVE HEALTH SERVICES								
<b>SUPPORT AND ASSISTANCE</b>								
HOME CARE SERVICES								
AT HOME PROGRAM PACKAGES								
SURREY ON CALL								
FAMILY SUPPORT PROGRAMS								
<b>ENGAGEMENT AND PURPOSE</b>								
EXPANDED VOLUNTEERISM								
INTERGENERATIONAL PROGRAMS								
SURREY ACADEMY								
<b>INNOVATION AND LEADERSHIP</b>								
VIRTUAL PROGRAMMING								
BEILSON INSTITUTE FOR INNOVATIONS IN AGING								
COLLABORATIVE LEADERSHIP								

Light blue, planning and soft launch, dark blue begin fully implementing plan

# Path to Implementation

## **First Community Planning Meeting:**

Held 3/9/20 to gain insights, ideas, and perceptions about Surrey, potential directions for the future, and ways to strengthen the ultimate impact of Surrey on the community.



## **Second Community Group Meeting:**

Held 7/23/20 to present the first draft of the “Strawman Plan” to garner reactions, thoughts, insights, and additional ideas for incorporation into the final plan.



## **Third Community Group Meeting:**

Held 8/10/20 to present modifications to the Mission, Vision, Core Values were presented, and gain feedback on core strategies and objectives.



## **Strategic Planning Committee:**

Held 9/11/20 to present the Strategic Plan to the Strategic Planning Committee of the Board for action and recommendations to the full Board for review.



## **Adoption of Final Plan:**

Strategic Plan presented to the full Board for review at the 9/17/20 meeting, and advanced to the Board for action at the September 25 Board meeting.