

## REAL Services Strategic Plan

**2018-2023**

**Mission Statement:** The ultimate objective of REAL Services is to assist in establishing a community in which those we serve can maintain their independence to the maximum degree possible and find meaning and satisfaction throughout their lives.

**Values:** Trusted, knowledgeable, caring, person centered

**Vision Statement:** REAL Services will be recognized as the trusted and valued community resource for Aging Adults, those striving to become financially self-sufficient, those with Alzheimer's and Dementia as well as those who care for them.

GOAL	Strategy	Who	OUTCOMES
I. Increase marketing so that those in our Community know REAL Services can be of assistance.	1. Determine staffing to enhance marketing.	1,2	Job outline of skills and duties developed by 6/18.
	2. Narrow and define REAL Services' message	1,2,4	Working with Notre Dame, by 12/18, a marketing message will be clearly articulated for: a) Alzheimers Services b) Family Development and Self Sufficiency Programs c) Meals on Wheels and more d) Aging information and access
	3. Develop a Marketing Plan	1,2,4	Marketing plan initiated: a) Alzheimer's Services by 12/18 b) Meals and More by 6/19 c) Family Development by 12/19 d) Aging information and access by 6/20
	4. Execute Marketing Plan	1,2,4	
	5. Increase awareness and access to services through website	2,5,18,20	Web site updated : a) Alzheimer's Services by 6/18 b) Meals and More by 6/19 c) Family Development by 12/19

	<p>6. Increase awareness and access to services through media coverage</p> <p>7. Communicate with elected officials</p> <p>8. Measure Results</p> <p>18 Self Sufficient in 2017 14,500 called the ADRC in 2017 4,500 contacted Alzheimer's Services In 2017 8020 served by Energy Assistance in 2017.</p>	<p>2,4</p> <p>1,8</p> <p>20</p>	<p>d) Aging information and access by 6/20</p> <p>New releases and media releases written and mailed monthly</p> <p>Provide written progress update at least semi annually Arrange to meet annually</p> <p>3% more clients will be self sufficient each year from 2020 to 2022 5% more clients with contact the ADRC each year 2021-2022 5% more families will contact Alz. Services in by from 2020 to 2022 3 % more clients served in Energy Assistance, beginning in 2019.</p>
<p>II. REAL Services will increase and diversify funding to decrease dependency on Federal funds.</p>	<p>1. Increase Social Enterprise through food truck to support Meals on Wheels</p> <p>2. Maintain catering efforts</p>	<p>5,9</p> <p>5,9</p>	<p>Purchase and equip food truck by 3/18 Launch food truck by 5/18 Attend 30 events a year; break even in 2018 Attend 35 events a year, earn \$10,000 in 2019 40 and \$15,000 45 and \$20,000 50 and \$25,000</p> <p>Profit will continue at \$50,000 a year</p>

	3. Initiate REAL Services Endowment	1,2,3, 6,12	Create REAL Services held endowment by 6/20; grow by \$5,000 in 2021 and 2022.
	4. Invest agencies assets to maximize returns	1,2, 3,6,12	Investments will be in interest bearing accounts. Decision made on agency accounts made by 1/31/18  Accounts moved or updated by 6/30/19
	5. Increase donations through individuals	1,2.	Increase the number of unique donors by 2% each year, currently 2345 donors.
	6. Increase membership in Les Fox Circle	1,2	Increase Les Fox Circle members by 3% a year; there were 64 founding members. 80 members by 2022. Monthly contacts Annual thank you event
	7. Increase grant requests	2	2 new grant requests per year From 2018 to 2022, currently 7 per year
	8. Increase community trainings in Dementia, Family Development	10,13	Add two dementia trainings in 2019 and each subsequent year Add one family development training and each subsequent year Research process for offering CEUs
	9. Evaluate Weatherization/ home-repair/home modification	1,5,20	Business plan prepared and offered to Social Enterprise Committee by 1/20

	social enterprise		
<p>III. REAL Services will increase its capacity and options by increasing and leveraging our partnerships.</p>	1. Communicate and work with partners to meet unmet needs.	1,20	Each department will identify and meet with 4 new partners a year
	2. Develop MOA with partners for improved referrals	1,15	ADRC will develop MOA with 4 new referral sources a year.
	3. Work through partners to articulate REAL Services programs.	1,2,4	CEO and Marketing manager will meet with 3 partners a year to provide annual update Quarterly e-newsletters
	4. Create links for on-line applications to REAL Services programs as well as other needed services.	1,9,16,18,	Online application for EAP by 4/2018 Online application for Transportation by 4/2019 Links to Medicaid application by 4/19 Links to HIP 2.0 by 10/10
	5. Increase the number of volunteers for guardianship	2,15,17	Increase guardianship volunteers by 5% in 2018; currently 38
	6. Increase the number of volunteers for meals on wheels	2,9,17	increase meals on wheels volunteers by 5% in 2019; currently 132
	7. Increase the number of Alzheimer's services volunteers	2,10,17	Increase Alzheimer's Services volunteers by 5% in 2020; currently 32
	8. Risk Management	1,14	Contingency and staffing plans will be developed to respond to shifting federal and state priorities. Align with agency priorities Option 1 created by 1/18 Option 2 created by 6/18

	9. Coordinate in-house communication with partners	20	<p>Option 3 created by 1/19</p> <p>Review all in-house newsletters by 1/19 Determine consistent messaging; timing and audiences by 6/19</p> <p>Define process for all requests for support, donations and gifts by 6/19</p> <p>Define process for all presentations, health fairs, and panels by 1/21</p>
IV. Those who contact REAL Services will see and feel excellence through a team of staff and volunteers who are knowledgeable and compassionate.	1. Increase in-house communication.	1,2,11	Develop in-house newsletter by 6/18 An agency internal face book will be initiated to celebrate personal joys and milestones By 6/19
		1,11,20	Hold all agency updates in person or via Zoom twice a year
	2. Staff development	1,14 1,11,20 20	Develop in-house CPA Provide training to agency supervisors 2x annually
		13,14,16	Provide departmental training 2x per year Two additional staff members will secure CCAP designations by 2022.
	3. Internal monitoring	1,11,20	Determine quality measures for each department by 1/19 and report quarterly

	4. Permanent home for Alzheimer's Services,	1,2,10,	Capital campaign for Alzheimer's by 202
	5. Evaluate and improve office environments.	1,3	Evaluate and improve Michigan street office by 12/18  Evaluate and improve Main street office by 6/19  Evaluate and improve case management offices by 6/20
	6. Volunteer Recognition	1,2,17	Recognition for volunteers annually beginning 2019 and ongoing  Recognition for volunteers at 5 year anniversaries, beginning 2020 and ongoing
	7. Staff Engagement	1,11,20	Identify core values and weave into recruitment and hiring: staff video by 2/18
		11,20	Weave core values into orientation – Around REAL by 6/18
		1,2	Staff FunD Committee Plans 1/18 to 1/22
		1,11	Work/Life Committee initiated by 6/19
		15,18	Purchase iPad for options counselors by 1/19

		1,7,11	Compare benefits, salary and personnel polices to similar organizations by 6/18 and then again in 6/20
	8. Staff recognition	1,11	Recognize staff at 5 year milestones beginning 1/18
		1,11,7,20	Revise staff evaluation and salary increase process to reflect values and productivity by 2022.

Strategic Plan Responsibilities:

1. President/CEO Chairman of the Board/Executive Committee
2. Director of Development/ Development Committee
3. Finance Committee
4. Marketing Manager/Marketing Committee
5. Social Enterprise Committee
6. Foundation Board
7. Personnel Committee
8. Board of Directors
9. Director of Nutrition and Transportation
10. Director of Alzheimer's Services
11. Director of Human Resources
12. Director of Finance
13. Director of Community Services
14. Director of Budget Management
15. Director of Area Agency on Aging
16. Director of Energy Assistance
17. Volunteer Coordinator
18. Network Administrator
19. Weatherization Director/Aging in Place Coordinator
20. All Agency Directors