2020

Sound Generations Strategic Plan

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We envision a just society where aging adults and those who care about them can live their best lives in a supportive and caring community.
To support people on their aging journey through community connections and accessible services.
Business Summary

We are the most comprehensive non-profit organization serving older adults, disabled persons and their loved ones in Washington State. Established in 1967, we promote positive aging for thousands of aging adults and their families each year through our integrated system of quality programs and senior centers. Our work is made possible by more than 180 employees and 2,100 volunteers.

Half of our $16 million annual budget comes from taxpayer-based sources, including federal, state, city and county government. We also receive program service fees, client and individual donations and support from corporations, foundations and civic organizations. We raise additional money from fundraising events and activities. Our programs include: Caregiving Support and Counseling; Community Dining; Geriatric Regional Assessment Team; Health and Wellness; Hyde Shuttle; Meals on Wheels; Minor Home Repair; Pathways Information and Assistance; 5 Senior Centers (Ballard Northwest, Lake City, Shoreline/Lake Forest Park, Sno-Valley & West Seattle); Senior Rights Assistance; Statewide Health Insurance Benefits Advisors; Volunteer Transportation.
Organization Chart

Executive Assistant (Kaleb Greissl)

CEO (Jim Wigfall)
  + Chief Operating Officer (Joanne Donohue)
    - Health and Nutrition Programs
      • Director, Community Dining (Suman Mondal)
      • Director, Meals on Wheels (Adam Porter)
      • Director, Health and Wellness (Page Denison)
    - Director, Assistance Services (Salina Jones)
      • Information and Assistance
      • Caregiver
      • SHIBA
      • Senior Rights Assistance
      • GRAT
    - Transportation Programs
      • Director, VTS (Suman Mondal)
      • Hyde Shuttle Operations Manager (Mark Smutny)
    - Director, Minor Home Repair (Adam Porter)
      • Senior Center Directors
        • Shoreline/Lake Forest Park Senior Center (Theresa LeCroix)
        • Ballard NW Senior Center (Carlye Teed)
        • Sno-Valley Senior Center (Lisa Yeager)
        • Senior Center of West Seattle (Amy Lee Densenthal)
        • Lake City-Northgate SC Project (Yedrana Dorakovic)
  + Chief Financial Officer (Carlos Rojas)
    - Controller (Christina Hannan)
    - Facilities Manager (Ron Jandrasil)
    - Director, Information Systems (John Geigelman)
  + Chief Marketing and Philanthropy Officer (Brittany Blue)
    - Mission Engagement Manager (Desirae Taylor)
    - Mission Engagement Associate (Raven Davis)
    - Grants Manager (TBD)
    - Donor Relations Manager (Brina Stevenson)
    - Donor Relations Associate (Molly Huser)
    - Digital Communications Specialist (TBD)
    - Marketing Specialist (TBD)
  + Director, Human Resources (Greg Roberts)
    - HR Generalist (Zoharia Ali)
    - Total Rewards Analyst (Lauren Spencer)
The overall strategic goal for Sound Generations is to develop a sustainable business model which focuses on our unique value proposition to increase awareness of our mission to support people on their aging journey through community connections and accessible services.
A: Financial Stability

Financial stability affords our organization the ability to ensure decisions are driven by data that will support mission execution today and for years to come.

B: Mission Focus

Support for our mission improves our financial performance and clearly demonstrates our shared goal to our ever-evolving clients, funders and donors.

C: Developing and Engaging our Team

Staff development builds a strong collaborative and philanthropic culture that will develop the long term capacity necessary for sustainable change and an engaged staff.
Sound Generations in 2021

**Partnerships**
- Strong relationship with Senior Centers
- Healthcare – spinning out new programs
- Community partners

**Volunteers**
- Enterprise-wide program
- Recruiting to represent the population served *
- Retention

**Community Awareness**
- Strong brand identity
- Brand is clear, prominent

**Financial Stability**
- Diversified funding streams
- King County Levy
- Less reliance on ADS
- Unified effort to participate in philanthropy

**Programs**
- Robust
- Responding to the Age Wave
- Money following the programs

**Serving**
- Seniors
- Adults with disabilities
- Care-givers
- Underserved populations

**Talented Staff/Board**
- Growing to represent population served*
- Development opportunities
- Competitive compensation
- Staff and Board working together
- Board members with connections to needed resources

**Systems**
- Better access to shared data
- Robust Intranet
- Being in HIPAA compliance
- Using data for decision-making
- Transparency
- Paperless
- Optimized for efficiency
- Continuously improved

**Culture**
- Culturally friendly
- Barriers reduced
- Inclusion and equity
- Transparency
- Regular open communication
- Culture of philanthropy

*Staff and volunteers will reflect populations they serve in ethnicity and language.*
The overall strategic goal will be accomplished by:

1: Establishing and strengthening partnerships and new opportunities.
2: Creating solid funding/revenue streams.
3: Expanding the knowledge and awareness of Equity and Inclusion.
4: Developing and engaging our team.
5: Developing a comprehensive branding and marketing strategy.
6: Integrating Innovation into processes and services.
1: Establishing and strengthening partnerships and new opportunities

Comments: Goals have been identified for each program and senior center to establish or expand their relationship with an organization serving people who have been historically underserved. Additional funding has been awarded to the Caregiver, Meals on Wheels and two RFPs to Evidence Based Health Promotion programs.

2: Creating solid funding/revenue streams

Comments: We currently have QRC Codes on our website and Meals on Wheels Outreach Post Cards. We’ve agreed with Humana to improve social determinants of health with their chronically ill patients post hospitalization in 2021. We have completed work on our initial sustaining donor campaigns: Positive Aging Partners, Legacy Network and Corporate Giving Partners. We relaunched the Planned Giving Program in the Fall Newsletter. Work has begun on updating the website pages to match new look and feel of collateral created.
3: Expanding the knowledge and awareness of Equity and Inclusion

Comments: The Equity and Inclusion (E&I) Report has been completed and included in the Sound Generations Annual Report. The E&I Committee created an indigenous people land use acknowledgement statement that is shared at the beginning of internal meetings. Additionally the E&I Committee is working on creating standardized processes for organizational purchasing and creating space for aging adults voices to be heard at public forums towards our broader communities goal to create safe communities for all around the Defund the Police messaging. Completed all six training series of Culturally Responsive Communication to the entire organization.

4: Developing and Engaging our team

Comments: Effective January 1, 2020, low salaries were increased to the 25th percentile. The first three quarterly editions of our internal newsletter, “Inside Sound Generations”, have been distributed. Organizational goals have been identified as a result of the 2019 Engagement Survey and uploaded into ADP for all employees. Departments and employees have also identified additional goals specific to them. We’re distributing a monthly HR Report that began in June. A Warehouse Culture Committee has been established and meeting regularly to improve the environment. The second floor of the Lillian Rice building was reconfigured and new office furniture procured for GRAT.
5: Developing a comprehensive branding and marketing strategy

Comments: The volunteer and staff toolkit have been created. Swag (t-shirts, calendars & masks) are for sale on website. Created the first window wall at the Lillian Rice building in partnership with Kaiser Permanente around ending Senior Summer Hunger, generating advertising buzz. Our Mission Engagement Manager was hired and is developing the 2021 Sponsorship Packet and Advertising Promotion Kit. Automation has been increased, for example doubling your donation and recurring donation pop-ups for online gifts, boosting overall giving among individual donors. Our Marketing team is almost full. In process of interviewing for last open position (Marketing & Communications Specialist).

6: Integrating Innovation into processes and services

Comments: The Point of Sales system for the senior centers is on hold until after the pandemic. All servers have been updated to Server 2019 with the exception of the SQL Reporting Server and workstations to Windows 10. The new firewall and new VPN appliance have been implemented. Rebuilding the Enhance SalesForce/Reporting framework is on hold until 2021.
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- **On Track**
- **On Hold**
- **Some Risk**
- **Completion in Jeopardy/Re-plan**
- **Complete**
1: Establish and strengthen partnerships and new opportunities. (Joanne Donohue)

A: Each program and senior center establishes or expands on a relationship with an organization serving people who have historically been underserved. (December)
Status: On Track
Comments: Goals have been identified for each program and documented in the Equity and Inclusion Continuous Improvement Plan format.

B: The Health and Wellness Department offers Enhance Fitness Classes in Pierce, Kitsap, Lewis, Grays Harbor and Mason Counties so that reimbursement increases .50 per participant per class each year over the next four years. (Ongoing)
Status: Slowly Moving Forward
Comments: COVID-19 is significantly diminishing our reimbursement because classes are not being held. The Health and Wellness program is now offering virtual versions of all its evidence based programs and we are able to bill Kaiser. Participation is starting to occur, but much lower than the in-person classes.
C: Explore and apply for all Veterans, Seniors & Human Services Levy opportunities that align with our mission and core competencies. (Ongoing)

Status: On Track
Comments: Additional funding awarded to Caregiver, Meals on Wheels and 2 RFP’s were awarded for Evidenced Based Health Promotion programs.

D: Respond in a timely fashion to all health care partnership invitations. (Ongoing)

Status: On Track
Comments: Continuing to move forward with Humana and will be offering transportation, meals on wheels and home modification to Humana members starting in January 2021.
2: Create solid funding/revenue streams. (Jim Wigfall)

A: Implement QRC Codes to improve awareness and support. (October)

Status: Completed
Comments: We have QRC Codes on our website, Meals on Wheels outreach post cards and the window wall for the Inspiring Positive Aging Awards nominations.

B: Partner with Humana to provide meals and transportation post hospitalization. (September)

Status: Completed
Comments: We’ve met and agreed with Humana to move forward partnering with them to provide food security, transportation and some minor home repairs to their chronically ill patients post hospitalization starting in 2021.
C: Establish a “Tribute Giving Page”/”Birthday Giving Campaign”. (June)
Status: Completed
Comments: Tribute Giving Page – We have built out a Tribute Giving Page that was launched and promoted for Mother’s Day and Father’s Day generating additional donations during the second quarter. Birthday Giving – We have enabled a birthday card automation through Mailchimp. It sends a custom birthday card to all active donors (gift in past 36 mo.), where we have birthdate information on file for the desired month.

D: Work with retail partners/sports teams for donation and visibility opportunities. (June)
Status: Completed
Comments: Conversations have been initiated with the Seattle Storm and Seattle Mariners. However, COVID-19 has sidetracked progress. Solidified a partnership with Bartell’s Drugs for Older American’s Month. Solidified a partnership with the Seahawks and in conversation for a larger 2021 joint venture.

E: Relaunch the Planned Giving Program. (September)
Status: Completed
Comments: The relaunch was included in the Fall Newsletter with a focus on a Legacy Network testimonial from a member of our Board of Directors. All Major Donors received a Planned Giving inquire form. We are using our newly acquired iWave prospect research tool to identify planned giving leads to receive collateral information.
**F: Partner with Homage to present a business case to interested health care providers. (Ongoing)**

Status: On Track
Comments: Working with Homage to finalize an LLC relationship to improve social determinants of health with healthcare providers. For Pierce County we will subcontract with Lutheran Community Services and Catholic Community Services.

**G: Increase the City of Seattle funding to Meals on Wheels. (Ongoing)**

Status: Completed
Comments: We received some additional funding that has been secured from Health and Human Services.
3: Expand the knowledge and awareness of Equity and Inclusion. (Brittany Blue)

A: Collect gender and racial identification information on Applications (Board, Staff, Clients and Volunteers). (November)

Status: On Track
Comments: We do have gender and racial information collected for our staff and some volunteers. The volunteer work group has developed a standard set of demographic questions to be included in all versions of volunteer applications. A common volunteer application will be live on our website.

B: Create an annual Equity and Inclusion Report with Equity and Inclusion Highlights. (April)

Status: Completed
Comments: An Equity and Inclusion Report was completed and included in the Sound Generations Annual Report, Spring 2020.
C: Conduct a Train-the-Trainer session for the Equity & Inclusion Committee members enabling them to facilitate Equity & Inclusion Basics Training.  
(December)  
Status: On Track  
Comments: The first step was completed with Equity & Inclusion Basics training being provided to the Equity & Inclusion Committee. This will be part of the committee’s 2021 goals.

D: Conduct quarterly Equity & Inclusion Basics training for all new hires.  
(Ongoing)  
Status: On Track  
Comments: The Equity & Inclusion Committee has conducted the Basics training to the committee members, but given the composition change we may need to conduct it again. Working with HR to get E&I Basics up and running again for a second quarter 2021 rollout.

E: Conduct race and social justice based training quarterly throughout the organization.  
(Ongoing)  
Status: Completed  
Comments: The Equity and Inclusion Committee has rolled out a six training series on Culturally Responsive Communications and the first module occurred on June 21st with 32 participants.
4: Developing and Engaging our team. (Greg Roberts)

A: Bring low salaries up to the 25th percentile. (January)

Status: Completed
Comments: A salary review was conducted across the organization. There were 47 individuals identified and their salary was increased to bring them to the 25th percentile effective January 1, 2020.

B: Create an internal newsletter highlighting program, department and senior center activities. (April)

Status: Completed
Comments: The first edition of “Inside Sound Generations” was created April 1st, the second edition July 1st, the third edition October 1st and distributed via email to all employees. This quarterly newsletter shares what’s happening throughout the organization keeping everyone better informed.
C: Identify organization, program and department goals as a result of the 2019 Engagement Survey results. (May)

Status: Completed
Comments: The organization established three goals and uploaded them into ADP for all employees. The goals are: 1. Improve processes and reduce waste. 2. Equity and Inclusion Team Goal. 3. Employee Engagement Team Goal. Departments and employees have also identified additional goals specific to their needs.

D: Increase the favorable percentage of the organization’s Engagement Score on the Engagement Survey. (November)

Status: On Track
Comments: The organization is taking several proactive steps to engage and recognize employees in 2020, including but not limited to: Hosting the All-Staff Meeting; Providing weekly “Wigfall Wrap-Up” messages; Providing weekly “COVID-19 Update” messages; Distributing a monthly HR Report beginning June 2020; Providing flexible options for employees wishing to self quarantine; Providing temporary work opportunities during the pandemic; Expanding work from home opportunities during the pandemic. Conducted a COVID-19 Check-In Survey (approx. 65% response rate) and communicated results back to employees with action steps in certain areas.
E: Explore Internships and Work Study Partnerships (Higher Education Board). (Ongoing)

Status: On Track
Comments: Sound Generations has had a few departments pivot and provide intern on-site and remote intern opportunities. Interns have been working in Assistance Services, Community Dining, Health & Wellness and some Senior Centers on public health, wellness and social services initiatives and projects. Once the pandemic passes, efforts will intensify to partner with more colleges and universities.

F: Improve the Working Environments (Working Space and Experience). (Ongoing)

Status: On Track
Comments: The pandemic has resulted in 61% of the organization working from home part or full-time. Many administrative employees work from home and appreciate the change. Some employees working from home especially with kids or spouses are also home, may not feel the work space has improved. Many food security and transportation employees report feeling additional stress due to safety concerns and protocols and are not able to work from home. A Warehouse Culture Committee has been established to improve the environment. The second floor of the Lillian Rice building was reconfigured and new office furniture has been procured for GRAT. Work is still underway to fix a water leak in the ceiling of the 3rd floor of the Lillian Rice building.
5: Develop a comprehensive branding and marketing strategy. (Brittany Blue)

A: Increase the staffing for Marketing and Philanthropy. (May)

Status: Completed
Comments: A mission Engagement Manager and Donor Relations Associate have been hired. The only position left to staff is the Marketing and Communications Specialist.

B: Cohesion – Sound Generations Parent Brand needs to take center stage in all illustrations. (May)

Status: Completed
Comments: New theme website conversion is done, new theme branded roll up program signs created and simple branded swag is in production. New brand shared in 2019 Annual Report to positive external reviews. We now have branded table clothes. Photo and story bank library are now complete. Will focus on the outside of the Lillian Rice building now.
**C: Continuity – Everyone needs to be on the same page for Message, Look and Feel. (November)**

Status: Completed

Comments: New messaging created (Who We Are, What We Do, What We Believe) including programmatic taglines. Sound Generations branded brochure has been completed along with a Sound Generations Board, Volunteer and Staff Tool Kits have been created. Flyer templates will be part of 2021 work.

**D: Seek Media partnerships. (Ongoing)**

Status: Completed

Comments: Media Kit is complete and has been shared broadly. Have partnered with the Puget Sound Business Journal to be included as a one page spread in the 2020 Giving Guide and 2021 Book of Lists. Recently partnered with the Seattle Met for organizational and Golden Gala visibility. KIRO 7 has included us in several community campaigns.

**E: Establish Window Advertisements. (July)**

Status: Completed

Comments: First Advertisement went up in March promoting the Inspiring Positive Aging Awards Nominations. We now have a formal Advertisement Pricing Guide. Currently working on window wall for Kaiser End Summer Hanger $100K commitment.
6: Integrating Innovation into processes and services (John Gleichman)

A: Implement a Point of Sales system for Senior Centers. (December)
Status: On Hold
Comments: As a result of the pandemic, we put this project on hold since activity at the senior centers were going to be minimal. In the interim, senior centers found alternatives. We'll consider implementing a Point of Sales system after the pandemic.

B: Update all servers to Windows Server 2019 and all workstations to Windows 10. (September)
Status: Completed
Comments: All the servers (25) have been updated to Windows Server 2019 and the workstations updated to Windows 10.
C: Upgrade Firewall/Network infrastructure to enhance remote access and security. (September)
Status: Completed
Comments: We have rolled out the new firewall VPN for everyone.

D: Rebuild Enhance Salesforce/Reporting framework to streamline all Enhance processes. (December)
Status: On Hold
Comments: We don’t think we’ll be able to get to this project in 2020 with everything else going on. The server is ready, but we need to move all the other programs to a new server first. We’ll complete this in 2021.

E: Focus on deployment of Office 365 tools (Teams, OneDrive, Power BI). (Ongoing)
Status: On Track
Comments: The shared drive will be moved to Sharepoint before the end of the year and everyone will have the necessary licenses for security. Microsoft Teams and PowerBI are now used frequently in many parts of the organization. Office 365 will be our dominate workspace platform by the first quarter of 2021.