2023

Sound Generations Strategic Plan
Outline

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7. Sound Generations in 2025
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We envision a responsive, multigenerational community that recognizes and fulfills the diverse and changing needs of everyone as we age.
Mission

We partner with older adults to provide accessible and inclusive services so they can age their way.
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 1,500 volunteers.

Half of our $22 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; 6 Senior Centers (Ballard Northwest, East African, Lake City, Shoreline/Lake Forest Park, Sno-Valley & West Seattle); Senior Rights Assistance; Volunteer Transportation; WeCare Medicare.
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 partner with older adults to provide accessible and inclusive services so they can age their way.
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 2025

**Partnerships**
- Strong relationship with Senior Centers
- Collaborate/integrate with other non-profits
- Community partnerships

**Community Awareness**
- Strong brand identity
- Address access to barriers
- Invest in cross promotion and/or media partnership

**Volunteers**
- Organization-wide program
- AmeriCorps Vista, Work Study, internships
- High School Opportunities
- Civic Organizations

**Programs**
- Digital Equity for clients
- Housing
- Adults with Disabilities
- Mental and Behavioral Healthcare

**Serving**
- Seniors
- Adults with disabilities
- Care-givers
- ESL and Immigrant populations
- Veterans

**Financial Stability**
- Diversified funding streams
- Efficient SG facility footprint
- Leverage and build partnerships
- Transparent and understood budget

**Culture**
- Employee Engagement
- Equity and Inclusion
- Transparency
- Regular, open communication
- Sustainable practices (GREEN)
- Active Listening to staff

**Talented Staff/Board**
- Locally competitive pay
- Career development and succession plans
- Remote and hybrid work
- Staff and board diversity
- Learning and development opportunities
- Employee and talent retention

**Systems**
- Data Security
- Less Complex systems
- 100% Paperless (GREEN)
- Visible data-based decision making
- Digital Equity for staff

**Sound Generations**

*Staff and volunteers reflect populations they serve in ethnicity and language.*
• Reaching all of our constituents throughout King County with all of our services.
• Serving all seniors, adults with disabilities, caregivers, ESL and immigrant populations and veterans.
• A transparent and collaborative working relationship with affiliated senior centers.
• A robust Health Insurance Portability and Accountability Act (HIPAA) compliant computing environment.
• Compensation above the 60th percentile for non-profit organizations in Seattle.
• Less than 50% of annual revenue from federal, state and local governments.
• A warehouse environment that meets the expectations of the staff.
• Training budget in place and used by staff.
• The Sound Generations brand known throughout King County.
Upcoming Large Investments

1: New front door for the Lillian Rice Building (LRB) (~$8K) – 2023
2: New ERP System (TBD) – 2023
3: Common Area finishes and updates for the LRB (~$19K) – 2024
4: Plumbing Systems and domestic hot water for the LRB (~17K) – 2025
5: Heating, Cooling and Ventilation for the LRB (~$60K) – 2026
## 2022 Financial Actuals and 2023 Budget

### Table: 2022 Financial Actuals and 2023 Budget Overview

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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 Diversity, Equity and Inclusion.
4: Developing and engaging our team.
5: Maintain a comprehensive branding and marketing strategy.
6: Integrating Innovation into processes and services.
1: Establishing and strengthening partnerships and new opportunities

Comments: We continue to actively participate on the Connect2Community Network Advisory Board and in the Home Advantage LLC. We receive referrals on a daily basis through the UniteUs platform.

2: Creating solid funding/revenue streams

Comments: Verizon is in the process of putting the equipment on the roof of the Lillian Rice building for a Cell Tower. We have a new partnership with Walgreens, CVS Health and the Museum of Pop Culture. We’re working with Humana to provide home delivered meals, transportation and minor home repairs to their chronically ill clients once released from the hospital starting in 2024.
3: Expanding the knowledge and awareness of Diversity, Equity and Inclusion

Comments: We’re partnering with the Little Light Consulting firm to complete some DE&I foundational work with our Board and Staff. We’re also leveraging their expertise as a DEI Advisor for the organization, leading our DEI Committee meetings and engaging with several teams.

4: Developing and Engaging our team

Comments: The HR job description review and update project has completed. In January 2022, we met our goal of bringing all employees compensation to the 50th percentile. The Compensation Plan, Career Development Plan and Succession Plan are posted on ADP>Resources>Tools/References along with other helpful resources. The ADP Performance Evaluation process and Employee Development form was updated based on employee input and initial feedback has been positive. We added a 2022 Team Goal for all employees to “improve communication and collaboration”. This addresses a specific area for improvement that was identified in the Employee Engagement Survey. We are also committed to regularly addressing Employee Engagement Survey feedback in Wigfall’s Wrap-Up, HR Report, Inside Sound Generations, DEI meetings and similar meetings.
5: Maintain a comprehensive branding and marketing strategy

Comments: Great focus ensuring proper use of branded collateral and messaging through flyers, postcards, note cards and power point templates for organizational use to keep brand recognition consistent across programs and centers. We are now looking at how to transfer our internal success outwardly to the community. We are looking at various cross promotion opportunities and media partnerships for the organization that make sense. The focus is to:

• Create familiarity with our brand, services, and value as a non-profit in the community we serve
• Create partnerships that allow us to magnify our outreach and promotion efforts
• Invest in “walking promotion” swag
• Create more visually apparent interrelation to the senior centers while developing clear and concise messaging that explains the organizational and senior center relationship
• Look at all marketing efforts for accessibility and ease of access and understanding regardless of one’s cultural, racial, or ethnic background.

6: Integrating Innovation into processes and services

Comments: Working to greatly simplify the IT network management throughout the organization and fundamentally shift the nature of our IT skills.
## 2022 Sound Generations Strategic Plan Timeline

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<th>Jan 31(^{st})</th>
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- **On Track**: Green
- **On Hold**: Black
- **Some Risk**: Yellow
- **Completion in Jeopardy/Re-plan**: Red
- **Complete**: Blue

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<table>
<thead>
<tr>
<th>2022 Sound Generations Strategic Plan Timeline</th>
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<tr>
<td>Jan 31(^{st})</td>
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</table>

- **On Track**: Green
- **On Hold**: Black
- **Some Risk**: Yellow
- **Completion in Jeopardy/Re-plan**: Red
- **Complete**: Blue
1: Establish and strengthen partnerships and new opportunities. (Joanne Donohue)

A: Translate the work that GRAT initiated during 2020 and 2021 into at least two formal partnerships with BIPOC led community organizations. (December 2023)

Status: On Schedule

Comments: In the process of getting this activity started.

B: Simplify the “Due To/Due From” relationship between Sound Generations and affiliated centers so that the two parties can devote more energy towards addressing ideas that came out of the Center Director’s Retreat. (December)

Status: On Schedule

Comments: The focus has been on getting the “Due to/Due From” settled from previous years and once that is behind us, we can focus on implementing the process that Carlos Rojas outlined in a flow chart.
C: Restart the WeCare Medicare Program and establish at least five relationships with community organizations that allow the insurance broker to have regular sessions with older adults. (December)

Status: On Schedule
Comments: Our new insurance broker will start working July 11th.

D: Expand Hyde Service to three Eastside communities (Bellevue, Kirkland and Redmond) with a focus on serving Russian, Chinese, Hindi and Spanish speaking older adults. (July 2023)

Status: On Schedule
Comments: Letters of support have been secured from one of the cities and working on the other two. Letters from one Community Based Organization has been secured and working on two others. Met with Indian American Community Services and they are interested in partnering with Sound Generations. We have not been successful in getting responses from organizations serving Chinese and Latinx older adults.
E: Expand Minor Home Repair Services to Federal Way, Black Diamond, Pacific Algona, Maple Valley, Enumclaw and Normandy Park. (December)

Status: On Schedule
Comments: Application was submitted mid June and we have an interview in mid-July. Funding announcements will be made later this year. Our regular updates to the City of Seattle about the waiting list has finally gotten a response.

F: Work with the Senior Center Directors to improve the relationship between Sound Generations and the Senior Centers. (October)

Status: On Schedule
Comments: A retreat was held in April with the Senior Center Directors and Sound Generations Leadership to discuss how we work together, the strengths of the Senior Centers and develop some strategic priorities.
2: Create solid funding/revenue streams. (Jim Wigfall)

A: Partner with Homage and Lutheran Community Services to put in place the processes for HomeAdvantage to provide meals, transportation and minor home repairs to Humana chronically ill patients post hospitalization. (January 2024)

Status: On Schedule
Comments: We’re working with Homage and Lutheran Community Services to clarify the services that will be provided to Humana and developing the pricing model.

B: Work with retail partners/sports teams for donations and visibility opportunities. (October)

Status: On Schedule
Comments: We’ve established new partnerships with Walgreens, CVS Health and the Museum of Pop Culture.
C: Secure sufficient funding to sustain the East African Senior Center Program. (December)
Status: On Schedule
Comments: We have assurances from the City of Seattle that the $130,000 funding is ongoing. However, this is only about half of what is needed to sustain the program.

D: Increase the City of Seattle funding to Sound Generations Programs. (Ongoing)
Status: On Schedule
Comments: We’re in conversations with the City of Seattle to secure additional funding.

E: Install a Verizon Cell Tower on the roof of the Lillian Rice building. (August)
Status: On Schedule
Comments: The installation process is going well. Verizon is in the final stages of completing the wiring.
3: Expand the knowledge and awareness of Diversity, Equity and Inclusion. (Tierney Yates)

A: Conduct bi-weekly Track Session Workshops from June through September. (September)

Status: On Schedule
Comments: The first Track Session, Equity & Inclusion Alignment, was conducted June 28th. The second session, Non-profit Storytelling is scheduled July 19th.

B: Conduct Quarterly Manager and Supervisor Trainings. (November)

Status: On Schedule
Comments: The training dates are being scheduled.
C: Conduct monthly Healing Sessions. (December)
Status: On Schedule
Comments: Several Healing Sessions were held in the first quarter and more sessions will be scheduled in the second half of the year.

D: Revamp the New Hire Diversity, Equity & Inclusion Onboarding Training. (November)
Status: On Schedule
Comments: The New Hire Diversity, Equity & Inclusion Onboarding Training is in the process of being developed.

E: Create Diversity, Equity & Inclusion Volunteer Training. (November)
Status: On Schedule
Comments: The Diversity, Equity & Inclusion Training for Volunteers is in the process of being developed.
4: Developing and Engaging our team. (Greg Roberts)

A: Update the Compensation Plan and bring all employee pay up to the 50th percentile of regional Washington Non-profits. (January)
Status: Completed
Comments: Planning has begun to bring all employee pay to the 60th percentile compared to Seattle Non-profits of a similar size by 2025. Job description updates will now be conducted on a bi-annual or “as needed” basis.

B: Distribute internal communications highlighting program, department and senior center activities and recognizing employee contributions. (Ongoing)
Status: On Schedule
Comments: Inside Sound Generations, Strategic Plan Updates, Wigfall’s Wrap-Up, HR Report and periodic social media posts cover program, department and senior center highlights and employee recognition.
C: Identify organization, program and department goals as a result of the 2021 Engagement Survey results. (April)

Status: Completed
Comments: Sound Generations established and communicated three goals. 1. Team goal related to improving DEI or putting DEI into action. 2. Team goal to improve processes and reduce costs. 3. Team goal to improve communications and collaboration (an area specifically identified as needing improvement in the Employee Engagement Survey. Departments and employees will also identify additional goals specific to their needs.

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

Status: On Schedule
Comments: The Employee Engagement Survey results were shared via email and next steps were reviewed with employees during the All-Staff meeting in February 2022. DEI Committee has scheduled and offered a series of trainings and healing sessions. A Career Development Plan to build workforce capacity and grow our team has been posted on ADP and a revised performance evaluation and employee development process was implemented in 2022 with input from employees. Succession Plan has been implemented and a number of emerging leaders have been recognized with additional duties and responsibilities.
E: Expand programs, community partnerships and support initiatives that advocate for diverse communities. (Ongoing)

Status: On Schedule
Comments: We’re working to expand Minor Home Repair to six additional cities: Algona, Black Diamond, Enumclaw, Maple Valley, Normandy Park and Pacific.

F: Improve the work environment and experience. (Ongoing)

Status: On Schedule
Comments: The Safety Committee has cross-organizational representation and has taken steps to document safety checks and procedures at each location. New audio-visual equipment has been installed in the Paul Allen Conference Room. Tenant improvements have been agreed upon with the Warehouse owner and are being implemented. The organization Board and leadership are looking at alternative locations for Warehouse programs and staff. Many employees and programs prefer the remote/on-site hybrid work and discussions have begun on how to restructure Lillian Rice workspaces to reflect the new reality.
5: Maintain a comprehensive branding and marketing strategy. (Brittany Blue)

A: Cohesion – Sound Generations parent brand needs to maintain consistency while improving accessibility across platforms, programs and sites. (November)
Status: Ahead of Schedule
Comments: We will begin to focus efforts on physical spaces inside and outside Sound Generations to ensure look and feel of collateral is mirrored in public shared spaces. The accessibility toolkit is being revamped to include a “quick reference” digital share. The website has the first 10 main pages updated with proper alt text inclusion on all images. Working on the next main 10 pages now. We have taken initial steps to refresh the website homepage to eliminate it’s static feel with a rotating focus each month. Full implementation will begin in August 2022.

B: Continuity – Everyone needs to utilize tools that embodies the same message, look and feel. (February)
Status: Completed
Comments: Great focus on distribution of branded collateral and messaging through flyers, postcards, note cards and power point templates to keep brand recognition consistent across programs and centers. The Sharepoint location on teams has been shared with all and we send out a monthly update to all-staff on where to find resources and how to engage MPhD with assistance and support for program/center projects.
C: Evaluation – Develop useful Key Process Indicators that will allow us to gage the effectiveness of our marketing efforts. (Ongoing)

Status: Completed
Comments: Now that we have a solid brand, message and awareness we will work on determining the right outreach rhythm and focus for our identified platforms per associated audience. We will be digging deeper into the analytics to determine what components will define success for us. We now have analytics “Year over Year” that we are using to make decisions about what to share, how and how often. We have engaged support to help us maximize our $10,000 Google ad grant each year while supporting programmatic promotion efforts on social media for service and hiring. As part of our digital expansion, we have now instituted a drip campaign for new donors that will help us easily promote all we do regardless of how they initially engaged with our organization while improving revenue generation of 2nd gift rate and frequency.
A: Remove all non-data servers. (October)
Status: On Schedule
Comments: The primary task is to remove the Active Directory network at the downtown office so that any remaining servers will be isolated and more secure. Servers at all the senior centers will also need to be removed so our entire network can be managed in Microsoft 365.

B: Rebuild the two Reporting Servers. (October)
Status: On Schedule
Comments: Many of the program reports used with Salesforce are generated by on-premises SQL servers that were both built over 10 years ago with little regard to security. These both need to be completely rebuilt for a secure environment.
C: Automate GetCare Data Entry. (May)

Status: Completed
Comments: When ADS mandated that we would need to enter all of our clients and services into the state Getcare system late in 2021, it appeared as if we would need to hire additional staff to mindlessly punch data into that system. Initial tests showed that it would take an average of 120 hours/month of continuous data entry split between multiple department to complete this task. We were able to largely automate the whole process so that it now takes roughly 4 hours/month to monitor the automation.

D: Determine Salesforce Replacements. (December)

Status: On Schedule
Comments: The RAND report from 2021 showed that we should focus on “Best-of-Breed” software solutions for all of our programs instead of building and maintaining our own systems. MOW and CD currently use highly-developed, customized Salesforce systems that have become too large to be managed effectively. We need to identify replacement programs this year so we can implement them next year. We also need to transition one senior center from Salesforce to MySeniorCenter.com so that we can transition the others more easily next year.
E: Implement a Cloud-based phone system. (December)

Status: On Schedule

Comments: We have always managed a phone system using servers at the downtown office. As part of the process to eliminate all server hardware, we need to transition to a hosted system, one that is completely managed by a third-party cloud system partner. This will remove the need for us to maintain unnecessary technical phone system knowledge on-staff and will help us better leverage our Microsoft 365 platform with enhanced communication throughout the organization. This is a complicated task, requiring coordination with all programs, centers, and departments so the project completion data is currently unknown, but it will either be late 2022 or early 2023.
1: Establishing and strengthening partnerships and new opportunities.

2: Creating solid funding/revenue streams.

3: Expanding the knowledge and awareness of Diversity, Equity and Inclusion.

4: Developing and engaging our team.

5: Maintain a comprehensive branding and marketing strategy.

6: Integrating Innovation into processes and services.