



Service Program for
Older People, Inc.
(SPOP)



Strategic
Directions Plan
2020 -2023

May 13, 2020



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New York Council of Nonprofits, Inc.

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Executive Summary

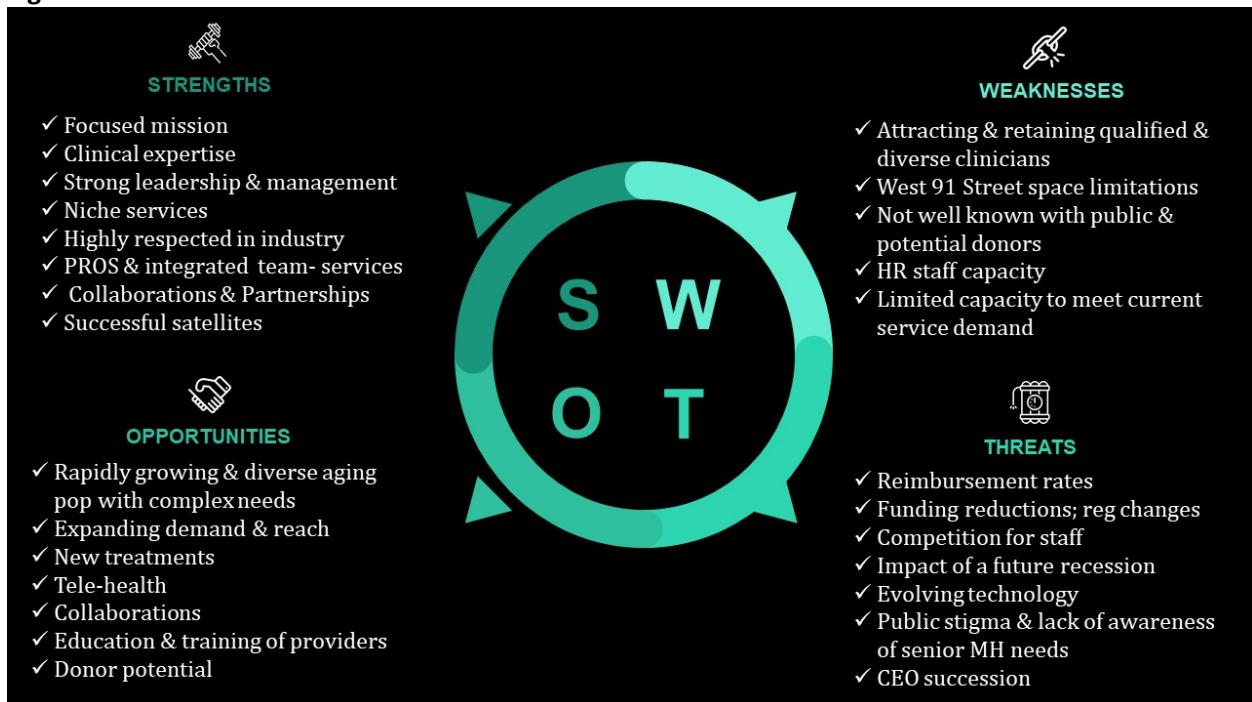
For Service Program for Older People, Inc. (SPOP), strategic planning establishes a general, board-approved roadmap that focuses and aligns the organization’s mission, values, programs, and financial and staff resources to the achievement of a vision within a period of time. The plan serves to provide a broad framework for SPOP to engage in an ongoing and “live” strategy-driven process as we progressively navigate a dynamic environment of demographic, service and business environment.

The Board of Directors and Management of SPOP engages in a formal strategic plan process every three years and regularly monitors and updates progress throughout. This strategic plan covers the period of 2020 through 2023 and was conducted with the professional assistance and support of the New York Council of Nonprofits, Inc. (NYCON).

Our planning process started in October 2019 with a SWOT-based (Strengths, Weakness, Opportunity and Threats) online survey of SPOP’s Board of Directors, Advisory Board, Consumer Board, as well as the Management Team and other staff. The responses were synthesized and then deliberated on in a facilitated session in January 2020 of the full Board with key management and representation by SPOP’s Advisory and Consumer Boards. A draft plan document was prepared in February 2020 for board consideration, however until June for the Annual Board Meeting. Overall, the strategic issues and directions cited in the February draft remain on-point and are presented herein. Where relevant, the plan incorporates COVID-19 related “impact updates” as appropriate.

Figure 1 below briefly displays the key SWOT findings from the survey. A more detailed narrative summary is in Appendix A.

Figure 1.



Service Program for Older People, Inc.

This 2020-2023 Strategic Plan largely affirms, with some amendment, SPOP's current Mission, Values and Strategic Vision for SPOP. The following outlines the Mission, Values and Strategic Vision, as well as Strategic Issues and Goals presented in the Plan:

MISSION, VALUES AND STRATEGIC VISION:

Mission: Amended SPOP's mission to reflect our increasing diversity population: "To enhance the quality of life of *diverse* older adults age 55 and older and to foster their independent living through the delivery of comprehensive mental health and supportive services, advocacy and education," is affirmed, however, a second sentence to emphasis integrated care as part of its values may be added, and particular attention will be paid to engaging the 55-60 age demographic moving forward.

Values: Amended SPOP's Values and Principles Statement with respect to the value of "Inclusivity" to broaden it to "Diversity and Inclusion" and to add under that area that SPOP will "continually strive to become culturally competent in effectively meeting the needs of a changing and diverse client population."

Strategic Vision: Slightly edit our current vision statement to reflect that SPOP has achieved the recognition in the industry as the "provider of choice". The vision statement now reads - "To extend our industry recognition as the provider of choice in NYC to that of the public by developing the organizational capacity to remain financially sustainable, support growth in quality services and geographic scope, and contribute to greater recognition of the critical issues affecting the mental health needs of older individuals".

STRATEGIC ISSUES AND DIRECTIONS:

The five (5) strategic issue areas of "cross-cutting" organizational significance which are addressed in the Plan, are:

1. **Diversity and Cultural Competency**
2. **Measured and Sustainable Growth**
3. **SPOP's Marketing and Public Profile**
4. **Fundraising and Earned Revenue**
5. **CEO's Succession Plan**

With respect to each of these issues, the following goals and associated action steps have been established:

- **Diversity and Cultural Competency - Build a diverse and inclusive workforce and continuously improve our cultural competency.**
 1. Conduct an organizational-wide (board, staff, policies and practices) diversity and inclusion self-assessment.
 2. As a result of the assessment, establish a process to develop and implement a diversity and inclusion plan with goals, strategies and outcomes that would supplement this strategic plan.
- **Measured and Sustainable Growth - Ensure SPOP has the capacity to continue our successful model of measured and sustainable service innovation and financial growth.**

3. Prioritize new satellite sites in Brooklyn and The Bronx as opportunities and partnerships warrant.
4. Develop an action plan to secure the West 88th Street lease that is up for renewal in 2021 or have an alternative site plan if needed.
5. Continue SPOP's readiness planning for the eventuality of a Medicare/Medicaid funding streams for tele-health services, including pilot funding.

➤ **SPOP's Marketing and Public Profile - Significantly Elevate the Public Brand and Awareness of SPOP.**

6. Develop a marketing plan.
7. Solicit the pro-bono services of or otherwise engage a Public Relations firm to plan and implement a public campaign.

➤ **Fundraising and Earned Revenue - Enhance Fundraising and Earned Revenue.**

8. Develop a multi-year fund development plan aligned with this plan period with financial goals.
9. Develop a business plan and formally implement a revenue generating education and training initiative.

➤ **CEO's Succession Plan - Update CEO's Succession Plan.**

10. In partnership with the CEO, the Board's Administrative Committee will review and update the CEO's Succession Plan.

I. Mission, Values, & Vision

A. Mission

Situational Summary:

SPOP's current mission, as affirmed in the previous plan is:

"To enhance the quality of life of older adults age 55 and older and to foster their independent living through the delivery of comprehensive mental health and supportive services, advocacy and education."

SPOP is a strong mission-driven organization. The current statement is considered relevant and accurate with the exception of it lacking a reference to SPOP's commitment to diversity. Concerns exist however that that insurance reimbursement and other funding pressures can harm mission progress, necessitating increased advocacy efforts.

Mission

SPOP's mission is amended to read: To enhance the quality of life of *diverse* older adults age 55 and older and to foster their independent living through the delivery of comprehensive mental health and supportive services, advocacy and education.

B. Values

Situational Summary:

SPOP adopted a statement of values and principles in 2018 (below) that served to unify the board and staff team as to SPOP's philosophical foundation and distinctive "niche" services and qualities.

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These values and principles expressed in according to four (4) areas of commitment: Quality Services, Integrity, Person-focused and Inclusivity.

A significant strategic theme that crosscuts throughout the organization is diversity. Under “Inclusivity”, the current statement refers to SPOP “supporting a diverse population”. Diversity and inclusion are complementary values and concepts but are distinctive. The statement can be improved by explicitly recognizing the importance of diversity and inclusion together and stating SPOP’s ongoing commitment to develop the capability, workforce and otherwise, to fulfill the responsibility of effectively serving diverse client populations.

Commitment to Quality Services

- We work to ensure that our services are age-friendly, accessible and designed through the perspective of the aging population.
- We strive to be a provider of excellence.
- We foster a workplace that encourages lifelong learning, open dialogue and sharing gained knowledge.

Integrity

- We conduct our business with the highest standards of professional behavior and ethics.
- We do the right thing for our key constituents: our clients, employees, partners, funders, and affiliates.
- We value transparency and honesty, and we take great pride in maintaining our reputation as a trustworthy organization.

Person-Focused

- We believe that well-being and quality of life are defined by the individual.
- We maximize independence by building on individual strengths, interests and abilities, and helping people achieve their best life.
- We treat each person with dignity and respect.
- We value our constituents’ right to self-determination and we join with them to help them use their voices for self-empowerment.

Inclusivity

- We value our communities and are committed to supporting a diverse population.
- We strive to create an environment that reflects the communities we serve where everyone feels empowered to bring their authentic and whole selves to SPOP.
- We respect and value diverse life experiences and challenges.

Values

SPOP’s values statement is amended to read: *“Diversity and Inclusion”* in place of *“Inclusivity”* and add the specific commitment of SPOP to *“continually strive to become culturally competent in effectively meeting the needs of a changing diverse client population.”*

C. Strategic Vision

Situational Summary:

For the purposes of this Plan, the “Strategic Vision” is defined as what SPOP reasonably aspires based on the achievement of its Strategic Directions by the end of the plan period. This vision statement describes SPOP’s overall intention with respect to organizational growth, scope of service, characteristics, sustainability, and/or competitive position in the communities served.

SPOP’s current strategic vision is that it will “be recognized as a provider of choice in New York City by developing the organizational capacity to remain financially sustainable, support growth in quality services and geographic scope, and contribute to greater recognition of the critical issues affecting the mental health needs of geriatric individuals.”

During this plan period, SPOP has gained the recognition in the industry or field as a provider of choice but has very limited recognition among the public including potential donors. The visions statement should reflect this progress and distinction.

Strategic Vision

SPOP’s strategic vision is amended to read: “To extend our industry recognition as a provider of choice in New York City to that of the public by developing the organizational capacity to remain financially sustainable, support growth in quality services and geographic scope, and contribute to greater recognition of the critical issues affecting the mental health needs of *older* individuals.”

II. Strategic Issues & Directions

The five (5) issue areas of significance that were identified in the Plan are:

1. Diversity and Cultural Competency
2. Measured and Sustainable Growth
3. SPOP’s Marketing and Public Profile
4. Fundraising and Earned Revenue
5. CEO’s Succession Plan

Figure 2.



A. Diversity and Cultural Competency

Situational Summary:

SPOP’s client population is rapidly growing, with the aging of the baby boomers and longer life spans. The older adult population served by SPOP are also increasing diverse in race, ethnicity, language, religion, sexual orientation, and complexity of needs. With limited financial and staff resources, SPOP faces significant challenges in having the workforce and cultural competencies needed to effectively meet the needs of diverse cliental. The expertise and commitment of SPOP’s staff are key to its continued relevancy and success.

Of priority, is the need for SPOP to have more clinicians of color with bilingual capabilities, especially Spanish speaking. The ability of SPOP to develop the clinical diverse workforce needed is largely not within SPOP’s control at this time. Such qualified professionals are a high premium in what is an extremely tight clinical labor market. SPOP implies that it does not have the financial resources needed to competitively compete against hospitals and larger institutions in this marketplace. This, besides the fact SPOP’s overall compensation has improved significantly over the years, and there are added financial incentives provided to bi-lingual staff.

SPOP has also significantly increased diversity representation on our board in recent year and there is strong and committed recognition throughout SPOP of the importance to continually improve its organizational culture with respect to diversity and inclusion and to work diligently to develop the awareness, knowledge and skills in need for employees to interact effectively with one another and with the people they serve. SPOP recognizes and has invested in improving the cultural competencies of its current workforce through trainings, participatory management and inclusive conversations.

The path to building a high-performing, diverse and inclusive workforce is a journey that requires concerted leadership attention and effort at the board and management levels. The challenges that SPOP faces are clear, but the solutions are not.

Strategic Direction: Build a diverse and inclusive workforce and continuously improve our cultural competency.

1. Conduct an organizational-wide (board, staff, policies and practices) diversity and inclusion self-assessment.
2. Following the self-assessment, establish a process to develop and implement a diversity and inclusion plan with goals, strategies and outcomes that would supplement this strategic plan.

B. Measured and Sustainable Growth

Situational Summary:

SPOP provides highly respected, quality services that are in high-demand and has effectively done by building strong and functional partnerships and collaborations over the years. The organization is very well managed and has grown programmatically, geographically, and financially in a measured manner.

Based on need and service demand, the board, management and staff see many opportunities for growth and expansion including, but not limited to, PRO’s, homebound services, care giver support, case management services, tele-health and more satellite locations, especially in Brooklyn and establishing a presence in The Bronx. Responsible growth and expansion, has been exercised by SPOP over the years, is reliant on funding opportunities that are reasonably sustainable, and a solid organizational and program foundation from which they are built upon.

SPOP is currently “running on all cylinders”. Given the volume of cliental, the diversity challenges faced, and lease expiration of and limitations at the West, 88th Street facility and corporate office, care needs to be taken to appropriately balance the capacity-building investments needed so that current service quality is preserved and continuously improved without compromise, while also positioning for new opportunities.

COVID-19 Related Impact:

The Centers of Medicare & Medicaid Services (CMS) and Medicaid loosened the regulations for telemedicine in response to and during the COVID-19 pandemic, allowing services to be delivered to Medicare beneficiaries by video and phone. SPOP implemented telehealth services quickly and with tremendous program and financial success. A “pilot”, per se, as stated in the fifth strategic direction is no longer needed; however, it is important to note that the regulations are temporarily waived and the risk exists the requirement for in-person sessions could return. The timing is critical for SPOP to continue its advocacy work to help ensure that the waiver becomes permanent.

Reimbursable telehealth services, if permanently allowed, could dramatically change SPOP’s need for and partnership strategies regarding satellite sites. Additionally, telehealth services coupled with the likelihood of SPOP incorporating the increased use of a remote work force, will lessen space pressures at its current offices.

The state budget deficit is going to result in significant health and social program cuts along with late contracts and payments to providers. It is also projected that there are many nonprofits that will not be able to remain financially viable. SPOP appears to be in a relatively strong position in this regard, however some of its partners, such as senior centers and other providers, are going to be threatened. Moving forward, SPOP should expect realignment of the provider landscape and may be approached regarding merger or affiliation opportunities.

Strategic Direction: Ensure SPOP has the capacity to continue our successful model of measured and sustainable service innovation and financial growth.

3. Prioritize new satellite sites in Brooklyn and The Bronx as opportunities and partnerships warrant.
4. Develop an action plan to secure the West 88th Street lease that is up for renewal in 2021 or have an alternative site plan if needed.
5. Continue SPOP’s successful efforts in implementing telehealth going forward.

C. SPOP’s Marketing and Public Profile

Situational Summary:

Although highly regarded and recognized in the industry, SPOP lacks the public and potential donor recognition that it deserves and seeks. Achieving a higher profile is challenged by the stigma associated with mental health, the lack of awareness of and understanding of the mental health needs of seniors, and, as a “niche” service, knowledge of what SPOP does and its valued impact in the community. Never-the-less, the growing, if not explosive need of seniors for SPOP’s services and SPOP’s need for unrestricted dollars, warrants serious consideration for a concerted public branding or educational campaign.

There is strong support within SPOP for the potential benefits that such a campaign would produce. Running an effective campaign, even just through social media, would be an expensive proposition

that would require outside professional expertise. The potential impact on SPOP's future is considered significant and may warrant SPOP to invest its own funds toward such an action.

COVID-19 Related Impact:

The pandemic has focused the public's eye on and concern for the lives and welfare of seniors as a "vulnerable population" including the mental health needs that the crisis has greatly exacerbated. The public is now prepared, more than perhaps ever, to have the stigma reduced, to be educated further on the needs, and to learn about the unique and vital importance of SPOP's work.

Strategic Direction: Significantly elevate the public brand and awareness of SPOP.

6. Develop a marketing plan.
7. Solicit the pro-bono services of or otherwise engage a Public Relations firm to plan implement a public campaign to promote SPOP and its work.

D. Fundraising and Earned Revenue

Situational Summary:

SPOP continues to be very successful in securing foundation and other grants to support its work and new initiatives. With respect to private donations, SPOP has long-standing donor relationships, but relatively few of which can be considered as "major gifts. SPOP's board is a well-performing governing board but it is not, nor anticipated to be comprised of very wealthy individuals. The board has an active Fund Development Committee and is planning a 40th year celebration event. The successful development of a marketing and perhaps public branding campaign as presented in this plan would offer substantial opportunities for new donors to SPOP and that effort would need to be aligned with the work of the Fund Development Committee.

SPOP's reliance on insurance reimbursement revenue is of an ongoing concern given the trends in the field and that rates are not sufficient to cover SPOP's cost of service provision, much less provide the added resources needed for workforce and other priority investments.

SPOP's distinctive staff expertise and competencies, coupled with the growing senior needs throughout NYC, provides an entrepreneurial opportunity for SPOP staff to conduct professional development training for professionals and agency staff. SPOP has piloted fee-for-serve trainings and believe there is a substantive market. SPOP lacks a business plan and is seeking foundation funding to support the development of such a plan.

COVID-19 Related Impact:

The economic recession and the competition for grant and donor dollars will be make fundraising even more challenging, however there is greater potential for fundraising success given the highly profiled needs that SPOP is addressing during the pandemic and what will be increased awareness of SPOP's work. This creates an urgency for the fund development plan to be developed quickly and in close alignment and integration with the marketing and public relations campaign.

The impact of the pandemic appears to have also generated increased provider needs and interest for consultation and training (online) by SPOP. SPOP has recently engaged in two fee-based projects. Online training is highly cost-effective in time and effort and can reach a broad, high volume market that does not necessarily need to be geographically based.

Strategic Direction: Enhance Fundraising and Earned Revenue.

8. Develop a multi-year fund development plan aligned with this plan period with financial goals.
9. Develop a business plan and formally implement a revenue-generating education and training initiative.

E. CEO Succession Plan

Situational Summary:

SPOP's long-tenured CEO has provided exemplary vision and leadership to the organization and is highly respected by the board, employees, and funders. Retirement is in the foreseeable future but there are no specific plans currently. The SPOP Board of Directors approved a succession plan several years ago which warrants review and possible updating.

Strategic Direction: Update the CEO's Succession Plan.

10. Working in partnership with the CEO, the Board's Administrative Committee will review and update the CEO's Succession Plan.

Appendix A: Board Member, Advisory Board, Management and Staff Survey Summary

2019 Strategic Planning Survey “Key Results at a Glance”

There were a total of fifty-eight (58) members of the SPOP staff team (38), Board of Directors (12), Advisory Board (3) and Consumer Board (5) respondents. The following synthesizes and condenses responses received as they related to a key strengths, weaknesses, opportunities and threats or challenges to SPOP; relevancy of SPOP’s current mission and vision statements; and, suggested key directions and strategic questions for board consideration.

Mission and Vision

- *Mission* statement is strongly supported; some suggestion to more directly linking the integration of physical health with MH.
- *Vision* statement is viewed positively; should it reference advocacy, future technology in service delivery (tele-health), and/or culturally diversity & competency?

Priority Directions and Key Strategic Questions

1. Measured Growth in Sites & Services that is Balanced with Staff Capacity and Financial Sustainability
 - What are our target priorities for expansion?
 - What are our strategies for building & investing in our capacity to maintain and improve current services while also positioning for expansion and growth?
 - What are the plans for West 91 Street?
 - What is the market & business potential for tele-health and how do we prepare?
2. Improve Diversity & Cultural Competency
 - Is there an interest/need for an agency-wide diversity & inclusion plan?
 - What are the priority goals & strategies (including investments) for staff diversity & language capabilities given client needs and trends?
3. Significantly Enhance Marketing & Fundraising
 - What is SPOP’s brand & plan for raising awareness of the needs of seniors with MH and related issues, and the critical importance of SPOP’s services?
 - How can we attract and cultivate new individual donors. Including through the web & social media?
 - What is the feasibility of a establishing a substantive endowment?
 - What is the role of the board and are composition needs?
4. Earned Revenue Through Education & Training
 - What is the business plan (market, revenue projection, investment, etc.)?
5. CEO Succession Planning
 - Are there timeframes & does the current plan need to be updated?

SWOT Analysis	
Key Strengths	Key Weaknesses
<ul style="list-style-type: none"> • Focused mission • Clinical expertise • Strong leadership & management • Niche services • Highly respected in industry • PROS & integrated team-based services • Highly collaborative; strong partnerships • Successful satellites 	<ul style="list-style-type: none"> • Attracting & retaining qualified & diverse clinicians • West 91st St. space limitations • SPOP’s not well known among public & potential donors. • HR staff capacity • Limited capacity to meet current service demand
Key Opportunities	Key External Challenges & Threats
<ul style="list-style-type: none"> • Rapidly growing & diverse aging population with complex needs warranting SPOP’s expertise • New treatments • Tel-health • Expanding demand & reach • Collaborations • Education & training of providers as an income & market generator • Donor potential 	<ul style="list-style-type: none"> • Inadequate reimbursement rates • Funding reductions & regulatory changes • Competition for staff from hospitals & other large providers • Impact of future recession • CEO succession • Evolving technology • Increasing senior diversity • Public stigma & lack of awareness of MH needs of elderly

**Service Program for Older People, Inc.
Strategic Directions Plan, 2016-2019
Draft 2-25-2016**

**Edited & Condensed Summary of Survey Results (12/31/2019)
Management and Staff, Board of Directors, Advisory Board, and Consumer Board - Strategic Planning Surveys**

Note – Survey questions varied slightly by respondent group. Gray shaded columns refers questions that were not asked of that respondent group. Where appropriate, narrative responses have been edited, condensed and/or aggregated to present views or themes that of significance to SPOP’s strategic directions. Observations that are asterisked () represent condensed statements with similar themes generally compiled from at least three individuals within the group. Statements from staff that related primarily to extraneous or detailed operational matters are excluded, but have been shared with management.*

Question	Management/ Staff N = 38	Board of Directors N = 12	Advisory Board N = 3	Consumer Board N = 5	Total Respondents N = 58	Observations/ Findings
Mission Accuracy Score (on 5 point scale)	4.55	4.75	4.33	4.80	4.58	Current mission statement is strongly supported
Anticipate Pressures to Change Mission	11 respondents <i>(Note: most respondents cited pressures that are not related to change in mission)</i>	3 respondents	1 respondent		10 of 22	No strong consensus to change mission

Question(s)	Management and Staff	Board of Directors	Advisory	Consumer
Pressures or opportunities over next 3 years that may warrant amending mission; additional comments or suggestions regarding mission	<p>Pressures</p> <ul style="list-style-type: none"> • Cutbacks in insurance government • More comprehensive advocacy & education • More advocacy not only for funding but also with insurance companies for comprehensive coverage for behavioral health (i.e. Medicare covering PROS) • More specific or focused mission • Increased pressure with amount of clients; can be overwhelming thus requiring better planning 	<p>Pressures</p> <ul style="list-style-type: none"> • Is age 55 still correct? <p>Opportunities</p> <ul style="list-style-type: none"> • Expand in education & training, as well as serve a younger population starting at 55 	<p>Pressures</p> <ul style="list-style-type: none"> • Add physical health? <p>Opportunities</p> <ul style="list-style-type: none"> • Integration of mental & physical health services • Problems with addiction <p>Other</p> <ul style="list-style-type: none"> • Care in planning for the future to avoid risk of turning in unsustainable directions. 	<p>Question was reworded: Any additional comments or suggestions regarding mission?</p> <ul style="list-style-type: none"> • Add wellness programs • Does education include counseling, classes, groups, etc. and support for using them? • Might include creative use of current & future

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Question(s)	Management and Staff	Board of Directors	Advisory	Consumer
	<ul style="list-style-type: none"> • Be prepared for clients of different backgrounds & language <p>Opportunities</p> <ul style="list-style-type: none"> • Tele-therapy • VBP for duly eligible (if happens) 		<ul style="list-style-type: none"> • Board maintaining expertise in quality service delivery, not tip balance toward business & FR 	<p>delivery options, i.e. spread in-house & geographic treatment modalities; may use future modalities – Tele-med, UR therapies, group distributed treatments, new reinforcement options (pet, art, music etc.)</p>
<p>Vision for 2022</p>	<p>Site Expansion/Partnerships</p> <ul style="list-style-type: none"> • Are there priority areas for the next three years? • Geographic presence growth – where? All NYC boroughs or all Manhattan neighborhoods? <p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Service Growth areas:* <ul style="list-style-type: none"> - Tele-therapy to eliminate access barriers* - PROs* - Homebound services* - Case management services • Partnerships are key* <p>Diversity</p> <ul style="list-style-type: none"> • Diversity references are missing, including multi-lingual services <p>Other</p> <ul style="list-style-type: none"> • Increased demand but need measured growth to ensure capacity to continue quality services 	<p>Site Expansion/ Partnerships</p> <ul style="list-style-type: none"> • Stable satellites in 4-5 boroughs • Expand strategic partnerships to expand reach • Be larger, expanding in Brooklyn & perhaps Bronx • Expanded availability to outer boroughs does not necessarily mean expanded service scope • Broader reach & NYC expansion <p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Expand PROS concept to broader audience (i.e. those with history of chronic MH not Medicaid qualified) • Provide TA & training to other MH orgs in bereavement counseling, aging, & advocacy • Explore providing consulting & advisory services to other orgs which could help raise 	<p>Advocacy & Education</p> <ul style="list-style-type: none"> • Be a leading advocacy org & strive to educate public & policy makers • Strive to enhance capacity in advocacy & education <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Expand visibility so New Yorker know where to turn for MH services for seniors • Become larger & better known as primary source of MH services for seniors <p>Diversity</p> <ul style="list-style-type: none"> • With (diverse) population increasing, we need to become more culturally competent 	<p>Site Expansion/ Partnerships</p> <ul style="list-style-type: none"> • Expanding services & sites with greater presence in Manhattan, Brooklyn & the Bronx • Expansion to meet anticipated increase in aging pop <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • More ways (beyond word of mouth) to learning about SPOP’s services i.e. Dr. referrals <p>Other</p> <ul style="list-style-type: none"> • Everything as now with shorter wait lists, more flexibility in choosing care providers, wellness programs, family

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Question(s)	Management and Staff	Board of Directors	Advisory	Consumer
	<ul style="list-style-type: none"> • Is the “leader” and “premier MH provide in NYC, delivering top quality MH counseling” 	<p>recognition, client referrals, & securing additional funds</p> <ul style="list-style-type: none"> • PROS program is sustaining • Expand knowledge transfer/training beyond current geographic scope • Expand services while maintaining sustainability <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Become household name for all things related to MH for older adults in NYC 		<p>programs for caretakers and others</p>
<p>Most significant service & growth opportunities</p>	<p>Site Expansion/Related Partnerships</p> <ul style="list-style-type: none"> • More space/satellites* • Continued alliances with hospitals & other locations for space <p>Programs & Services/ Related Partnerships</p> <ul style="list-style-type: none"> • Replicate PROS in other locations but also begin alternatives to PROS for specific older adults • Expanding homebound services * • Tele-therapy* • Staff capacity & development. • Developing a CEU program as part of education & training* • Hire more therapists • Staff training in services & technology* 	<p>Site Expansion/Related Partnerships</p> <ul style="list-style-type: none"> • New & expanded service & satellite sites; other boroughs* • Expand alliances with other providers • Primary clinic services through NYC <p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Tele-health • With increased lifespan & stress, greater need for MH services • Expanded TA & Training; expert TA; can generate revenue, improve brand positioning & credibility, and result in referrals* • Provide CE hours 	<p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Getting mission know widely & broadly. • The need for services will increase with the aging of the population and as health care orgs increasingly recognize the necessity of meeting the social & MH needs of the populations they serve. 	

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Question(s)	Management and Staff	Board of Directors	Advisory	Consumer
	<ul style="list-style-type: none"> • Group therapy for specific needs (i.e. grief, depression, gender specific issues) • Evening & weekend hours • Clinic is growing • Post-hospital MH services • Serving diverse population <ul style="list-style-type: none"> ○ Alliances w/referral feeder systems CBOs & hospitals for shared revenue, tele-MH, dementia programs, CEUs, etc.* <p>Other</p> <ul style="list-style-type: none"> • Bridging office & PROS gap, for both clients & staff • Being a more integrated agency i.e. one day being at same location • Modernize ways we collect payments with use of cell phones, tablets & websites 	<p>Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Ramp up donations from individuals, these are relatively small of total revenue today, opportunity significantly increase this by investing in marketing & branding building activities 		
<p>Most significant threats</p>	<p>Government & Managed Care</p> <ul style="list-style-type: none"> • Changing reimbursement landscape; Federal/state cutbacks; billing dependent on Medicare, Medicaid & managed care- insurance • Funding for homebound services & tele-health • Shifting politics • Inflexibility • Regulations are big threat; impede quality & focus • Lack of focus <p>Workforce & Compensation</p>	<p>Government & Managed Care</p> <ul style="list-style-type: none"> • Lack of consistent funding stream, inconsistent recoupment of revenue • Inadequate reimbursement rates • Federal funding. State/City cuts due to overspending. • Dependence on NYC funding if economy turns down <p>Workforce & Compensation</p> <ul style="list-style-type: none"> • Competitive pressure on salaries 	<p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Lack of public concern for older people <p>Leadership Succession</p> <ul style="list-style-type: none"> • Reliance on the dynamo that is Nancy Harvey. What is the succession plan? <p>Other</p> <ul style="list-style-type: none"> • The economy may go into recession and overall funding 	

Service Program for Older People, Inc.

Question(s)	Management and Staff	Board of Directors	Advisory	Consumer
	<ul style="list-style-type: none"> • Employee retention & competitive compensation (with hospitals & others), especially for highly skilled & bilingual staff* • Harder to hire & keep LCSWs, who are core of our clinic* • LCSW language requirements • Working conditions • Competition for staff & volunteers <p>Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Increasing MH stigma • Lack of foundation interest • Competition for funding <p>Technology</p> <ul style="list-style-type: none"> • Need up-to-date to be competitive • Billing & IT progress has been lacking 	<ul style="list-style-type: none"> • Shortage/pay constraints - LCSWs, multilingual LCSWs. Potentially the real estate market* <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Lack of private donors/supporters if a recession hits. • Raising money from all sources • Lack of an endowment <p>Strategic Partnerships</p> <ul style="list-style-type: none"> • Lack of growth & strategic partnerships <p>Other</p> <ul style="list-style-type: none"> • Pressure on rising medical costs. • Attrition due to people leaving the program through death or illness is the biggest threat 	<p>will be reduced for human services for a period of time</p>	
<p>Most significant organizational capacity strengths & assets</p>	<p>Workforce and Compensation</p> <ul style="list-style-type: none"> • The team from top to bottom • Skilled, experienced, knowledgeable & dedicated staff; solid core of clinicians; significant Spanish speaking* • “One of handful in NYC” with staff expertise; experience & knowledge of service providers* • Excellent connections in diverse industry segments 	<p>Workforce and Compensation</p> <ul style="list-style-type: none"> • Strong management capacity • Dedicated , highly skilled, quality staff • Steady long term leadership. • Good teamwork. • Scale in leadership positions based on industry knowledge • Senior leadership team led by Nancy & Catherine is fantastic. • Service ethic 	<p>Workforce and Compensation</p> <ul style="list-style-type: none"> • Great staff • Caliber of the staff, especially the employment of licensed clinical social workers, reflects a highly trained workforce • Good leadership judgment in expanding programming at a rate that does not overtax the org. <p>Programs and Services</p>	

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	<ul style="list-style-type: none"> • Strong admin/management team* - Shares same vision & works collaboratively - Strong hiring practices - Emphatic & warm leadership - Prioritizes support to clinicians, good supervision & eval efforts* - Very proactive; looking for new ways to serve - Small, centralized management, participant style - PROS is collegial - Staff leadership; consistency & knowledge of CEO* - Transparent: processes & info - Well organized, good communication <p>Reputation</p> <ul style="list-style-type: none"> • Very good reputation; respected* • Take advantage of great reputation for more clients <p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Quality services, Team-based MH service model, “from intake to discharge”* • Homebound services • Communication/collaboration across staff & programs • Commitment to outreach <p>Other</p> <ul style="list-style-type: none"> • Focused mission (no drift) 	<p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Excellent treatment modalities • Deep program knowledge <p>Reputation</p> <ul style="list-style-type: none"> • Superb professional/staff reputation • Reputation within the industry is SPOP’s greatest asset • Well-regarded in MH community <p>Other</p> <ul style="list-style-type: none"> • Longstanding donor relationships • Lean, efficient • Understanding that org must stay economically viable • Large network built over years 	<ul style="list-style-type: none"> • Wonderful programs <p>Reputation</p> <ul style="list-style-type: none"> • Amazing history • Incredible reputation. 	

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	<ul style="list-style-type: none"> • SPOP has survived where others have not; resiliency • Active leadership with Coalition for Behavior Health 			
<p>Most significant organizational capacity limitations or areas in need of Improvement</p>	<p>Workforce and Compensation</p> <ul style="list-style-type: none"> • Salaries, benefits are good but disparities among clinicians across programs; disproportionate staff focus on paycheck, not benefits* • Clinician workload* • Staff turnover due to salaries* • Learning, development, & promotion opportunities • Employee evaluation tied to salary rather than cost of living; not related to experience* • Bonuses during holiday; incentives • Thorough certifications in evidence based treatment • Hiring/retaining licensed clinicians • Lack of HR infrastructure; limited admin support including clinic* • More open communication w/staff about future planning, participatory management* <p>Diversity</p> <ul style="list-style-type: none"> • Cultural abilities – clinicians of color with bilingual/language capacity, especially Spanish* <p>Site Expansion/Partnerships</p>	<p>Workforce and Compensation</p> <ul style="list-style-type: none"> • Limited FTEs for FR & grant writing • Redundancy; turnover* • Lack of enough people with strong management & industry knowledge skills • Depth of management expertise • Pay higher salaries • Recruit adequately certified additional staff, particularly multi-lingual & multi-cultural; Bilingual workers hard to find* <p>Diversity</p> <ul style="list-style-type: none"> • Need more staff (including multilingual) <p>Succession Planning</p> <ul style="list-style-type: none"> • Leadership pipeline is key along with development • Lack of succession plans <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Marketing SPOP • Need an endowment • We can significantly improve our marketing and branding. 	<p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • Visibility among the public. <p>Leadership Succession</p> <ul style="list-style-type: none"> • If there is an ED transition due to retirement, there is a very substantial risk that the clinical expertise in delivering MH services will be lost. If this happens the quality of the staffing can be affected. This has happened in some of the most reputable agencies in the past few years. Having a licensed social worker who has the experience in running a not-for-profit is highly recommended. 	

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	<ul style="list-style-type: none"> • Lack of space for clinic, need more treatment rooms • Continue to hire more staff while having main location space needs & expanding outside our main location <p>Technology</p> <ul style="list-style-type: none"> • Ability to better serve, i.e. promote remote services* • Many clients are tech savvy, have cells, computers, and send emails, we should take advantage of this <p>Other</p> <ul style="list-style-type: none"> • Think bigger, not just use old ways 	<ul style="list-style-type: none"> • While our existing partners & donors are familiar with us, the website is not positioned well to attract new individual donors. • Funding imbalance - need more corporate & individual support 		
<p>Highest priority to be addressed in strategic plan</p>	<p>Workforce & Compensation</p> <ul style="list-style-type: none"> • Staffing* • Competitive salaries* • Maintaining quality services with supported staff • Trickle down strain • Employee retention, morale and bonding, learning & development opportunities* • More formal training, certifications in evidence based <p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Maintaining quality and accessibility of services • PROS program – great program may becoming more monolingual 	<p>Geographic Expansion/Space</p> <ul style="list-style-type: none"> • Geographic expansion including alternative day programming; deciding where • Space, serving the volume of clients & the homeless* <p>Workforce & Compensation</p> <ul style="list-style-type: none"> • Future staffing <p>Leadership Succession</p> <ul style="list-style-type: none"> • Succession <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • More targeted marketing plan to increase visibility & support any current & future expansion 	<p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Coordination of mental & physical health <p>Leadership Succession</p> <ul style="list-style-type: none"> • ED succession & maintaining the quality of services that has been the underpinning of SPOP's reputation 	<p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Family support and wellness in addition to the current mission which is the most important. • Possibly helping people to work through their health insurance. This may be done individually now, but beyond SPOP services, some might be happy to know they are not alone in the confusion.

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	<ul style="list-style-type: none"> • Expanding hours • Deciding what programs to grow • Changing MH landscape & SPOP relevance <p>Gov't & Managed Care/Funding</p> <ul style="list-style-type: none"> • Advocating for more funding • Expanded opportunities for earned revenue • More &reliable funding • Limiting financial stress • Insurance <p>Diversity</p> <ul style="list-style-type: none"> • Lack of cultural awareness of diverse populations <p>Technology</p> <ul style="list-style-type: none"> • Standardizing & upgrading 	<ul style="list-style-type: none"> • Expanding board members with marketing & social media skills. • Recognition of innovative services • Financial support beyond board • Increasing individual donors. Targeting individuals can start with revamping the existing website to make it more welcoming for those who are looking for MH services for their parents/elder; also improve our search engine optimization ranking so that we are easy to find <p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Expanding scope of educational & training programs <p>Govt. & Managed Care/Funding</p> <ul style="list-style-type: none"> • Expanded funding options <p>Other</p> <ul style="list-style-type: none"> • Managing & controlling growth; efficiencies • Currently firing on all cylinders in a challenging environment; recession in the next 3 years could make us financially vulnerable 		<ul style="list-style-type: none"> • The aging population and the necessary increase in staff satellite sites and continuing funding. • I have never received such support as with SPOP (in 30 years), I could only have imagined that if I came across SPOP a long, long time ago – I would have reached more progress in living my life fully. • Accelerate ease/speed of intake

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Greatest aspiration for SPOP to achieve		<p>Site Expansion/Partnerships</p> <ul style="list-style-type: none"> • Multi-borough expansion, • Further geographical expansion • Become a national org in strategic locations across US; growth model beyond NYC. • Citywide scope of services in partnership with citywide providers physical health <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • More name wide recognition • Become the darling of someone well known. Or that our board include very deep pocket members. • To see SPOP as a household name - like the Red Cross or the American Heart Association • Every adult in NYC to know that SPOP exist, • To be the first option when looking for MH services for family members. <p>Other</p> <ul style="list-style-type: none"> • Financial stability 	<p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • A SPOP department in all large NYC hospitals • Wellness to prevent later issues <p>Public Awareness, Marketing & FR</p> <ul style="list-style-type: none"> • That SPOP be recognized far and wide as the model provider of MH services to older people and that it be recognized in Albany and Washington DC in the way that an org. such as Henry Street Settlement over the years • SPOP have enhanced publicity & public education as well as a lobbying capacity in Albany to bolster support for both the agency and older New Yorkers in need of services. <p>Other</p> <ul style="list-style-type: none"> • Reference to advocacy & education are not clear; might be helpful to SPOPs multiple constituents to better understand its advocacy and for SPOP to think about whether there are additional opportunities for advocacy & ed. 	<p>Programs & Services/Partnerships</p> <ul style="list-style-type: none"> • Helping older people to remain involved – raising resources & providing volunteer opportunities; • Q&A sessions on health insurance, especially Medicare. • Well the issue of the aging, those who began their mental & emotional illness early – that SPOP stands as a beacon of hope to those lost and fallen through the cracks. • To be able to continue and extend its dedicated efforts
What You bring To SPOP		<ul style="list-style-type: none"> • Nonprofit experience • Project management some background in community health centers 	<ul style="list-style-type: none"> • Retired journalist, TV Directors & retired librarian. I also have good management & technical skills. 	<ul style="list-style-type: none"> • Real estate still could be the surprise problem that could undermine our future

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		<ul style="list-style-type: none"> • Understanding of MH community. Business judgment • Other than social work, I can contribute on all fronts as advocate, funder & problem solver. • Can help develop a strategy for growth through different channels and activities, also help solicit contributions through my network in the city. • Knowledge of the field and potential partners. Experience with SPOP 	<ul style="list-style-type: none"> • Pretty good at researching & compiling information. • Personal experience with SPOP & as a member of the Consumer Advisory Board where we contribute and comment on ideas & info presented by Nancy Harvey. • Basically a good typist but strengths are not leadership. • Some high profile people. • First-hand knowledge of the issues, mental & physical issues facing older adults • Knowledge of the expertise & support required in providing clinical services. Experience in leadership transitions Strategies for lobbying and advocacy 	<ul style="list-style-type: none"> • What has sustained us in the past is not likely to continue in the future
<p>Additional comments</p>			<ul style="list-style-type: none"> • Care in planning for the future to avoid the risk of SPOP turning in unsustainable directions. • Care is also needed to have a board that maintains an expertise in quality service delivery and to not tip the balance toward business and fundraising capacity. Many boards have lost the understanding of service delivery due to having members for their ability contribute money, 	<ul style="list-style-type: none"> • SPOP should maximize untapped resources in its “living room”; enable & encourage voluntary talent contributions from those we serve. On a primary level, a “comment & help” box encouraging wide feedback. It should capture talented folks to contribute to SPOP operations, thinking and planning. Our “living room” has folks with experience and expertise in writing,

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<p>Additional comments <i>(continued)</i></p>				<p>strategic planning, advertising, care provision, etc.</p> <ul style="list-style-type: none"> • I would hope that SPOP becomes a teaching venue to help other MH. I would hope that at some point SPOP is not only NY based with all the satellite openings, but as profoundly SPOP is so successful it may someday contribute to a nationwide example of sound MH service for the ever-increasing aging population. • I am always amazed and pleased to learn how SPOP is expanding. Expansion is a complicated process and SPOP's staff is extremely competent in doing all that needs to be done. Thank you for all do! • To be clear – the current mission is vital & SPOP does it very well. My suggestions are for additions, not replacements.