

## **2023 SPOP Strategic Plan Update**

### **Approved by the Board of Directors on 3/15/2023.**

As SPOP enters the 3<sup>rd</sup> year of its 2021-2023 Strategic Plan, the board and staff reviewed the plan to discuss what updates may be needed and to identify priority areas warranting attention for 2023. The review process was inclusive and included a survey of the board of directors, consumer board, advisory board, and staff as to the clarity and 2023 relevancy of the SPOP's mission and vision, the SWOT analysis, and the five strategic directions that have guided the organization. In addition, SPOP's DEI Committee conducted a self-identified staff diversity assessment. Both sets of survey data and preliminary findings were then discussed at a facilitated planning session of the boards and management in January and the plan was subsequently updated.

#### **Mission and Vision:**

The mission statement stands as is for 2023 and needs no updating. The vision statement however lacks a specific reference to SPOP's workforce and is amended (*italics*) as follows:

“SPOP will be recognized as a provider of choice in NYC by developing the organizational and diverse workforce capacity to remain financially sustainable, to 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.

#### **SWOT Analysis: What has Changed?**

SPOP has navigated through the pandemic-era amazingly well having successfully grown both programmatically and financially. This growth has been fueled by increased demand, excellent service, the use of telehealth technologies, and new funding opportunities.

SPOP's strengths, as currently identified in the plan, are affirmed with being “Mission-focused” benefiting from further clarification and a new strength, “Diversity in treatment modalities” being added. Mission is the core of SPOP's existence and how focused SPOP is on its mission is ultimately reflected in its service and care to older adults. This strength is better articulated as “A mission-focused commitment to client care”. Regarding the addition of “Diversity in treatment modalities”, it reflects SPOP's embracing of treatment approaches that are based on the client's lived-experience and culture, the importance of SPOP being able to relate as a provider, and client accessibility to services.

The weaknesses as stated in the plan remain relevant except for the space limitations of the West 91<sup>st</sup> facility. SPOP's success in implementing telehealth and developing a hybrid model that appropriately balances remote with on-site work has flipped and now the resulted in 91<sup>st</sup> Street being under-utilized in some ways.

The seven opportunities identified in the plan all remain relevant for 2023, however, an update and two additions are warranted. Telehealth is here to stay as Medicare telehealth benefits are now permanent

providing SPOP with a stable funding stream with tremendous revenue potential, assuming rates stay as is or increase. “Ongoing Medicare reimbursement for telehealth” is an update to this opportunity.

The two additions are “Geographic growth” and the “Benefits from a more strategically focused and resourced marketing plan”. SPOP has recently been awarded a contract to establish new satellite sites but there are some hurdles with the city/state that have yet to be overcome. The expanded client base helps fulfill SPOP’s city-wide mission and brings added resources to the agency. Marketing is one of SPOP’s strategic directions and the potential for SPOP to realize benefits from a greater marketing effort is seen as high given heightened public awareness of mental health needs and that SPOP can do much more to raise its profile outside of the industry.

### **Strategic Direction Updates:**

1. Measured and Sustainable Growth: A focus on measured and sustainable growth at SPOP has been a hallmark of SPOP’s business model. There are two primary concerns related to growth however going into 2023. One is that financial growth in recent years has in part been due to short-term pandemic relief funds. Financial planning will be needed to project when these dollars will expire, ascertain the impact on the organization, and develop strategies to replace those funds in the years ahead. In addition, the current economic downturn has it may affect the philanthropic community and public dollars, particularly federal cutbacks that are impending warrant consideration. The second issue, which may be more of a staff concern, is that the organization’s service and infrastructure capacity or “bandwidth” is unable to keep up with the growth opportunities, thus generating stress within the workforce. It appears that may be value in conducting informational conversations with non-management staff as to SPOP’s business model and commitment to measured growth.
2. Diversity & Cultural Competence: This strategic direction is a top priority for attention going into 2023, especially as it relates to staff diversity. The direction area is renamed to “Diversity, Inclusion and Cultural Competence” to reflect SPOP’s commitment more clearly to inclusionary values and practices. SPOP has a staff DE&I Committee that has been very active in increasing staff awareness and dialogue leading efforts where organizational improvements can be made. Moving forward, interested board members will be invited to participate on the committee. The diversity assessment provided baseline data that will be updated annually to reflect progress with staff demographics, Overall, the survey found that SPOP has making substantive progress in diversifying the workforce. Two notable areas that SPOP is particularly lagging is with African American and male clinicians. These limitations are seen as not being unique to SPOP but the social work profession and the field of aging in general.
3. Marketing & Public Profile: This strategic area, which has an impact on most all of the other directions, is also a priority for attention in 2023. Identified marketing audiences of priority are prospective employees including talent pipeline development, current and

potential donors, the corporate community, and the general public. Given high service demand, marketing to prospective clients is not seen as needed. SPOP has engaged in a range of marketing activities employing various platforms this past year including video productions that promote SPOP has having a workplace culture that employees value. For 2023, board and management will be engaged in focused planning conversations aimed at developing and implementing a cohesive marketing strategy that is goal and target audience focused.

4. Fundraising & Earned Revenue: SPOP has continued success in securing grant and earned revenue through its training and professional development activities. The board has also successfully launched the Nancy Harvey Initiative which fosters the careers of emerging social workers. General fundraising has been increasing annually in dollars raised but not at the level that meet the needs of the organization, especially given the anticipated loss of pandemic related revenue, nor the perceived potential that exists. Heightened marketing and public awareness efforts to the donor & corporate community is seen as a strategic prerequisite to successful fundraising efforts.
5. CEO Succession: A board-approved succession plan continues to be in place and should be regularly reviewed by the Board and CEO. There is at this time no planned retirement date.