

Strategic Plan 2021-2024



Plan Adopted June 2021
Revised October 2022
LOWLINC Board of Directors



INTRODUCTION

We are pleased to present this document that represents our plan for LOWLINC for the next several years. As we celebrated our fifth anniversary at the end of 2020, it was appropriate to reflect on the accomplishments of our first five years of operation and, more importantly, to look to the future to map LOWLINC's direction as an established, mature Village. In January of 2021, the Board established a working group to develop this Strategic Plan. Over the course of several months, the group consulted with an expert in organizational management and strategic planning—a volunteer we procured through grant support. We also met with LOWLINC leadership and conducted meetings with members and volunteers to assess our current state, brainstorm future direction and provide feedback as the plan developed. This plan is the result of that activity, reflecting LOWLINC's mission to enable older adults to remain in their homes by providing needed services and our broader responsibility to the community to promote health and wellness for all older adults.

In the fall of 2022, the Board and other LOWLINC leaders conducted a day-long review and discussion session to ascertain progress toward accomplishing the plan, and to discuss and make any necessary revisions. This revised plan will guide our programs and operations as we continue to serve our community.

John Beisheim, President
Steve Hein, Vice President & Secretary
Jean McLallen, Treasurer
Dave Davies, Board Member
Reggie Gavett, Board Member
Mary Jane Oldham, Board Member
Emily Slunt, Board Member
Jeanne Comeau, Executive Director

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OUR PURPOSE

We believe that having choice, control and connections to others transforms the lives of older adults. LOWLINC enables older adults to be healthy, happy and connected on their own terms as they age.

OUR DREAM

Through innovative programs, technology and community partnerships, LOWLINC will be viewed as a leading nonprofit volunteer service organization in our community, giving older adults choice and control to live safely and independently in their homes with friendships and connections that bring purpose and joy. We will be a catalyst for new Villages in our region; pioneer the use of new technologies to connect older adults with services, healthcare, and social engagement; offer a range of transportation options for older adults; and serve as a trusted resource on aging. We will explore partnerships both in Lake of the Woods and outside our gates, and we will foster diversity, equity and inclusion in all our volunteer and member programs and activities, including access to membership, thus enriching our entire community, both inside and outside Lake of the Woods.

OUR GOALS and CORE STRATEGIES

Our strategic plan focuses on nine (9) goals over the next several years: **Funding, Technology, Transportation, Member Services and Membership, Governance and Leadership, Health and Wellness, Partnerships, Impact and Volunteers and Volunteer Leadership**. Goals and Core Strategies to reach them in each area are established in this plan.

Funding

Goal: Fund new programs and growth while ensuring financial sustainability of the organization.

Strategies:

- Develop alternative funding sources as our highest priority for growth and sustainability.
 - Research funding sources.
 - Expand our presence outside LOW to attract financial supporters.
 - Partner with other villages in central Virginia to explore joint funding from foundations and other grantors.
 - Consider hiring an outside fundraiser.
- Form and maintain a Fundraising Committee to develop, coordinate, and execute an annual fundraising plan to meet LOWLINC's financial resource needs.
- Cultivate existing individual and corporate/business donor bases.
- Explore new ways to use technology for fundraising.
- Develop a Planned Giving Program and/or Endowment Program.

Technology

Goal: Take advantage of technology advances and build member and volunteer confidence and capacity to use technology.

Strategies:

- Create a committee to investigate and make recommendation to the Board regarding ways to most effectively use technology to meet our objectives.

- Offer training and coaching for members and volunteers in the use of technology.
 - Retain basic help desk intervention, problem-solving services.
 - Increase technology usage. (e.g., community news, family connections, entertainment, hobbies, telemedicine, on-line ordering).
 - Consider use of external resources (e.g., students with stipends).
- Maximize time-saving and evolving use of technology in organizational administration, fundraising and public face of LOWLINC.

Transportation

Goal: Provide transportation services to village members and be an advocate in the region for additional transportation services for seniors as the area continues to grow.

Strategies:

- Review results of area transportation needs assessment and use the information and data as we provide services to members and the community, and in our advocacy efforts.
- Identify ways to sustain transportation services to members beyond what we are doing now.
 - Increase training of drivers and community-wide use of RRCS van and minibus service.
 - Develop a campaign to recruit volunteer drivers.
- Explore passenger van service for the community.

Member Services and Membership

Goal: Maintain focus on serving LOWLINC members and growing membership as the core reasons for our existence.

Strategies:

- Retain focus on continuous provision of diverse social opportunities for members to increase enjoyment and reduce social isolation.

- Expand services to LOWLINC members as new needs are identified and trends in village service and capabilities expand.
- Grow membership so we can serve more people.
 - Reassess reduced fee membership programs, funding, and promotion.
 - Assess potential variations of membership models.
- Explore expanding services to older adults outside the Lake.
- Develop a membership campaign approach to recruiting and retention
- Develop and execute member retention programs that engage members and add value to membership.

Governance and Leadership

Goal: Ensure that LOWLINC is sustained with strong, engaged leadership; allowing Board to focus less on day-to-day operational activities.

Strategies:

- Continuously assess organizational capacity including staffing, volunteers, volunteer leadership, financial resources, and processes.
- Identify, recruit and onboard new board members.
- Evaluate board performance on a regular basis.
- Establish an Advisory Council to provide objective expertise and advice to LOWLINC.
- Review committee structure.
- Increase knowledge and skills to enhance committee participation and leadership.
- Advocate for the needs of older adults locally, regionally, and statewide.

Health and Wellness

Goal: LOWLINC shall be identified as a leader for improving the health of the community, especially for the initiatives related to older adults.

Strategies:

- Provide access to health and wellness programs, activities and resources.
- Work cooperatively with agencies focused on home care and therapies.

- Explore innovative ways to address social isolation in older adults.
- Create a committee to recommend, develop and coordinate LOWLINC's health and wellness activities.

Partnerships

Goal: Identify and develop partnerships that ensure that LOWLINC is represented in planning initiatives regarding older adults; increase ability to raise funds; enable LOWLINC to share resources and leverage benefits.

Strategies:

- Develop partnerships with other agencies, nonprofits, and health care providers.
- Optimize use of partnerships to enable LOWLINC to share resources and leverage benefits.
- Nurture LOWLINC's current partnerships and take advantage of opportunities to promote partners' efforts.

Impact

Goal: Evaluate and articulate the added value of our services.

Strategies:

- Incorporate value messaging in our communications.
- Assess our current method for evaluating the financial value and impact of our services and adjust the method as appropriate.
 - Establish metrics to evaluate and communicate impact and financial sustainability to current and prospective donors, corporate contributors, and grantors.
 - Compare cost of LOWLINC membership to open market prices and other VtV benchmarks.
 - Measure value of services delivered at the individual member level.
 - Monitor reserves in terms of multiple of annual costs.
 - Track sustaining donors, grantors, corporate contributions.

- Expand the use of metrics and impact assessment to encompass other LOWLINC program areas:
 - Technology
 - Establish metrics to define effectiveness of technology services.
 - Transportation
 - Establish metrics to define effectiveness of transportation services.
 - Member Services and Membership
 - Establish metrics to define effectiveness of social programs.
 - Establish metrics to plan for capacity and skill needs for volunteers.
 - Establish metrics to plan for effectiveness of growth through awareness and partnerships.
 - Track duration of memberships.
 - Health and Wellness
 - Establish metrics to define effectiveness of health & wellness services and partnerships.

Volunteers and Volunteer Leadership

Goal: Recruit, train, and nurture volunteers able to deliver services to LOWLINC members and serve in leadership positions.

Strategies:

- Continuously recruit and train volunteers according to evolving skills needed to meet the levels and diversity of demand for LOWLINC's service portfolio.
- Develop and conduct volunteer appreciation events and other efforts to ensure volunteers are recognized for their service.
- Provide training and other educational opportunities for LOWLINC volunteers to increase knowledge and skills.
- Communicate regularly with volunteers.