

NCOA/NISC SELF ASSESSMENT and ACCREDITATION MANUAL

PURPOSE AND PLANNING

PRINCIPLE

A senior center shall have a written mission statement, goals and objectives, and action plans consistent with the senior center philosophy. Strategic planning is the method by which these are developed. Goals and objectives are based on the mission and the needs and interests of older adults in the community or service area. The action plans describe how the work of the center's paid and unpaid staff will achieve its goals and objectives. These statements are to guide the character and direction of the senior center's operation and program.

RATIONALE

Through strategic and tactical planning a senior center sets the stage for what it will do. A senior center's operation is based on its mission statement; goals, objectives and action plan are also known as plan of work. These documents give direction to the board members, staff, volunteers, and participants. An annual report announces to the community the accomplishments and the people involved in those accomplishments.

An organization's mission statement provides its reason to be, the social justification for its existence and its purpose. It is the "who, what, where and why" of an organization. It is usually short, frequently inspiring, and is used to establish the scope and character of an organization's services and activities. The stakeholders of an organization should review

the mission statement at least every five (5) years.

Strategic planning identifies where an organization wants to be at some point in the future. The "strategic" part of this planning process is the development of future plans by looking at current conditions in the organization and external environment. Strategic planning is critical to the long-term success of an organization because it determines the overall direction and goals of the organization.

The strategic plan and the mission statement are the basis for development of goals and objectives, which serve as the guidelines for the senior center's work. Goals are broad statements and objectives are how those goals will be achieved. The same goals may stand for several years, but how they are achieved may change. The goals should reflect the needs and interests of older adults and acknowledge the availability of resources in the community, as well as, the skills and talents of the participants.

Objectives are the method to meet the goals. Objectives express, in specific and measurable terms, what the senior center wishes to accomplish within a specified time period. Regular reporting on the progress of attaining these objectives helps keep everyone on target.

An action plan explains how the individuals within a center work together to accomplish the objectives. Action plans list the specific activities that must be carried out to accomplish the objectives. They answer the questions: What? Who? When? The action

plan is the vehicle to carry out the goals and objectives and ultimately the mission. The goals, objectives and action plan make up the planning document.

The development process for the mission statement, goals, objectives and action plans should involve participants, paid and unpaid staff, advisory committees, community leaders and other stakeholders. Formal and informal involvement of a broad segment of stakeholders helps assure that the senior center's plans are realistic and have the support of those needed for accomplishment. Involving a broad segment of people affirms the central theme of the senior center philosophy – to be a focal point in the community. By

involving the community in planning, the senior center becomes part of community-wide planning and policy making. The final responsibility for the development and review of these statements rests with the senior center's staff and boards.

Organizations should recognize the value of producing an Annual Report each year. Annual reports can be used to demonstrate how you have accomplished your goals and contributed to the good of the community. This message can be delivered to your stakeholders, current and future donors, and can be used to cultivate new partnerships, and to recognize important people. It is another method of communicating with the public.

PURPOSE and PLANNING STANDARDS CRITERIA

A. Mission Statement

1. A senior center shall have a written statement that expresses its basic mission. The mission statement is:
 - a. Consistent with senior center philosophy;
 - b. Developed by participation from governing structure, paid and unpaid staff, participants and community representatives;
 - c. Description of the who, what, where and why of the organization;
 - d. Written in concise, clear and understandable language;
 - e. Physically visible in the center and on publications;
 - f. Reviewed regularly, every 3 to 5 years; and
 - g. Used as the test for new projects and activities.

B. Strategic Planning

1. A senior center should complete a strategic plan every 3-to-5 years. The process of developing a strategic plan should include:
 - a. An environmental scan - A wide look at what's going on outside the organization and its effects on the organization;
 - b. SWOT analysis - A review of what's going on inside the organization by looking at strengths, weaknesses, opportunities and threats;
 - c. The review and establishment of a statement for mission, vision and values;
 - d. Development of goals broad enough to be viable over the next three (3) to five (5) years; and

- e. Involvement of a committee made up of board, paid and unpaid staff, community members and other stake holders led by a facilitator skilled in leading groups through a strategic plan.

C. Goal and Objectives

1. A senior center shall have written statements of goals.
 - a. Goals carry out the mission;
 - b. Goals are developed through strategic planning process;
 - c. Goals identify major accomplishments that a center seeks to achieve; and
 - d. Goals are broad enough to be viable for 3-to-5 years.
2. A senior center shall have objectives that are developed as the way to accomplish goals. Objectives should have these characteristics:
 - a. Developed by the individuals responsible for carrying them out;
 - b. Measurable;
 - c. Reviewed annually by governing structure, advisory committees, paid and unpaid staff;
 - d. May change each year or be static for several years;
 - e. Available to the public, as needed; and
 - f. The basis for reports prepared and distributed to governing and advisory boards at least quarterly that describe the progress in meeting the objectives.

D. Action Plan

1. A senior center shall have an action plan that details the activities to be carried out to achieve the objectives.
2. An action plan shall:
 - a. Be developed by those involved in carrying it out, including paid and unpaid staff;
 - b. Consist of the steps that paid and unpaid staff perform to achieve an objective;
 - c. Be adjusted by staff to meet new circumstances or opportunities; and
 - d. Be available to those involved in carrying it out.

E. Annual Report

1. A senior center should produce an annual report each year as a way of communicating to the community its accomplishments.
2. At a minimum an annual report should contain:
 - a. List of Board of Directors or governing body;
 - b. List of additional decision making boards or committees;
 - c. Financial statement;

- d. List of staff; and
- e. Mission statement.
3. An annual report can:
 - a. Communicate activities completed by the organization;
 - b. Focus on accomplishments of the organization during the past year;
 - c. Show supporters that resources are being used in meaningful ways;
 - d. Educate community leaders and influential decision makers about the work on important issues regarding the senior populations;
 - e. Recognize special people including donors and volunteers;
 - f. Serve as a historical record of the organization's progress;
 - g. Show outcomes by including stories and changes in the lives of the constituents;
 - h. Record major decisions of the governing board.

ITEMS FOR ON-SITE REVIEW NOTEBOOK

- Senior center's mission statement
- Senior center's planning document with goals, objectives and action plan.
- Quarterly/semi-annual/annual reports on accomplishments of the planning document, which should provide an update on the accomplishments of your goals and objectives.
- The senior center's most recent annual report.

STANDARDS REQUIRED FOR ACCREDITATION

- A senior center must have a mission statement consistent with NCOA/NISC senior center's definition and philosophy.
- A senior center uses a planning document that consists of goals, objectives and action plans.
- Produces an annual report for the senior center

These are a few of the web sites that were reviewed at the time of this update. However, be aware that web sites can change. Using Google or another search engine may find additional sites

http://www.managementhelp.org/plan_dec/str_plan/str_plan.htm Alliance for Nonprofit Management

www.wmich.edu/nonprofit/Guide/guide7.htm Nonprofit Leadership and Administration Faculty
Western Michigan University

www.nonprofitexpert.com/strategic_planning.htm NonProfit Expert.com

<http://www.idealists.org/if/idealists/en/FAQ/QuestionViewer/default?section=03&item=22> Idealist.org