

**Harleysville Senior Center**  
**Strategic Plan**  
**2008-2011**

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## EXECUTIVE SUMMARY

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### *Grow, Change or Die.*

The world has changed dramatically since the Harleysville Senior Center was established in 1975. As the environment changes, any organization must reflect on what it does, who it serves, what the world needs and wants, and how to evolve to accommodate those changes while remaining true to its purpose and mission. Nonprofit organizations and the Harleysville Senior Center are no different. This plan outlines a realistic, achievable vision for Harleysville Senior Center to re-create itself—and even re-name itself—to continue to be a viable provider of much needed-services and opportunities to serve others for people 55+ in the North Penn community.

Montgomery County, like much of the nation, will experience significant growth of its 55+ population in the coming decade. To capture the evolving needs and preferences of this group in the County, public and private leaders collaborated to initiate the *BoomerANG Project*, a comprehensive process to examine changing demographics and begin planning for the growth of the county's 55+ population. This strategic plan sets itself squarely in the findings and recommendations of the BoomerANG report, building on Harleysville Senior Center's strengths to address the challenges and opportunities presented in the study.

With a new focus, the organization adopts a new mission statement to reflect a broader audience and a re-defined role for itself in the North Penn community. The mission statement now reads:

**To maximize the well being of area residents 55+ by providing access to programs, services and resources that promote health, continuous learning, growth and discovery.**

To pursue this mission, the following goals will be pursued over the coming three years:

1. Transform center-based services to become the senior center of choice for frail, elderly people living independently throughout North Penn.
2. Establish *Encorps Experiences* to enhance the sense of community and connection among people ages 55+ by offering meaningful opportunities to participate in civic life.
3. Build a strong organization capable of serving the needs and interests of people 55+ in North Penn.

Harleysville Senior Center will serve two distinct populations through two different operating divisions: one division will serve the Center's traditional membership base of older, less mobile seniors, and the other will serve Baby Boomers. The geographic reach will be expanded to serve all of North Penn with these focused services, rather than being a "full service" senior center focused exclusively on Harleysville. In short, rather than trying to be all things to all people

through one set of programs, the organization will target its services to distinctly different market segments.

Today, Harleysville Senior Center's typical consumer is an older, less mobile person. As such, Harleysville Senior Center will strengthen its services to the North Penn area's older, less mobile population by: a) expanding services and programs of greatest need and interest to the older and less mobile people (to include expanding the forms of assistance offered at the center) and b) extending services to people living independently in their own homes (or with family) and those living independently in apartment communities that do not have on-site social services. The Center will enter into discussions with the other North Penn senior centers to discuss how they can operate more as a "system" of independent providers, with Harleysville Senior Center serving those who are older and less mobile and the others serving populations that reflect their respective strengths and priorities. It is understood that the precise configuration of services and roles in a new "system" will need to be refined through these multi-lateral discussions.

Through its center-based services, Harleysville Senior Center will seek to serve Boomers who want to better understand how to care for their aging parents by providing information regarding service delivery and payment systems, and how to access resources.

At the same time, the Center's other division, to be called *Encorps Experiences*, will target people 55+ to promote civic engagement and volunteerism. Specifically, this division will work with other efforts in Montgomery County to harness the interests and resources of volunteers to expand the resources and capacity of adults ready to make a difference in North Penn and the world through volunteer and civic engagement activities. *Encorps Experiences* will operate in a variety of community settings outside of the senior center, ranging from places of employment to local libraries.

Also reflecting the evolving environment and a broader focus, the organization will change the names of the organization and its center-based services. A marketing firm will be retained to take a deliberate, structured approach to the re-namings which will be set in the context of a comprehensive marketing plan. The plan also calls for a major revitalization of the current center facility to assure that it is attractive and functional for both its current users and the generation to come.

The organization will be governed by a board of directors comprised of civic and corporate leaders drawn from its enlarged market area, i.e., all of North Penn. The two operating divisions will each have advisory boards to provide suggestions and insights to the board and management.

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## KEY FINDINGS

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### PURPOSE AND METHODOLOGY<sup>1</sup>

These findings were synthesized from confidential questionnaires circulated to Board members and individual interviews with key staff to determine their sense of Harleystville Senior Center's:

- Importance to users and the broader Harleystville community
- Core competencies
- Core values
- Current and anticipated needs of constituents
- Ideal program mix

In addition, Fairmount conducted individual, confidential telephone interviews with sixteen (16) individuals to explore impressions of Harleystville Senior Center amongst the following key stakeholder groups:

- Montgomery County senior centers
- Montgomery County social service agencies
- Current or previous funders
- Harleystville business community

Finally, four focus groups were conducted with:

- Active users of the Harleystville Senior Center
- Occasional (or drop-in) users of the Harleystville Senior Center
- 55+ employees of two Harleystville companies

Current users were asked to respond to:

- The center's most valuable and unique characteristics
- Recommendations regarding programmatic, administrative, and/or facility improvements
- Opinions of the county's other senior centers, YMCA, 55+ communities and other peers/competitors of the Harleystville Senior Center
- Ability of the Center to retain current membership, appeal to the 55-65 age group, and future relevance of senior centers

Employees of Harleystville's bank and insurance companies were asked to respond to:

- Current interests and leisure activities

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<sup>1</sup> Interviews were conducted during May and June of 2007 and do not reflect changes implemented since that time, such as increasing staff time to allow the center to offer expanded services.

- Retirement plans
- Anticipated post-retirement interests
- Willingness to engage in senior center activities

## STAFF AND BOARD OBSERVATIONS

### A. Importance to users and the broader Harleysville community

The Center plays an important role in the lives of its users, particularly for those older adults who cannot afford to live at one of the area's continuing care retirement communities. However, many of the Center's active users are becoming too old to make full use of its programs and services. In addition, it is becoming increasingly more difficult to attract or retain new members in the 70+ age group and nearly impossible to attract those in the 55-70 age group. All respondents noted that the center once enjoyed a reputation as the hub of activity for the community's seniors, but feel that many within the broader community today mischaracterize the Center's members as old and frail or do not know that it exists.

### B. Core competencies

The Center's users are particularly appreciative of its committed, resourceful, accessible and friendly staff. As such, members feel comfortable utilizing the services that are offered at the Center and enjoy spending their leisure time at this "home away from home".

### C. Core values

Board and staff believe that the Center should be a comfortable place that provides companionship, recreational and educational activities, and useful social services to older adults in ways that recognize and celebrate their ongoing contribution to the community in addition to meeting their immediate needs.

### D. Current and anticipated needs of constituents

The Center provides programs and services that are "appropriate" for its current users and anticipates that its future constituents will have similar needs. Staff members noted the recent increase in service requests and, as a result, anticipate the need for expanded information/referral services.

### E. Ideal program mix

Board and staff are in general agreement that they should continue to provide its current complement of programs and services to members that are demographically-similar to senior centers' traditional constituency. Some members of the staff expressed interest in expanding the social services it offers to area's older adults and becoming the "service campus" for Montgomery County's older adult population.

Board and staff acknowledge that they will need to alter their program mix and model of service delivery, develop new marketing strategies (to include a new name), and improve their facility if they are to be successful in attracting the 55+ population of Harleysville and its neighbors.

## EXTERNAL INFORMANT OBSERVATIONS

### A. Impressions of program mix, leadership and physical plant

While respondents from outside the aging services field generally feel that Harleysville Senior Center is providing useful services in effective ways, those within the field expressed their concern that the Center's viability requires more dynamic programs, more visionary leadership, and considerable improvements to its physical plant. Specifically, respondents noted that the Center's regional peers are offering more contemporary programs and amenities, thereby better serving their current constituents and attracting greater numbers of the 55+ generation. In addition, respondents believe that other community resources, such as the area's new YMCA and growing number of continuing care retirement communities, are offering higher quality programs in more modern facilities.

### B. Understanding of the current and anticipated needs of Harleysville's 55+ population

External respondents emphasized that the region's 55+ population is still working and plans to remain active well into their future. In addition, most respondents were unable to speculate on the future needs of a population generally characterized as independent and self-sufficient. Many expressed their belief that this group would have the financial means to pursue any recreational or educational opportunities of their choosing and purchase high-quality goods and services to meet any emerging needs.

As such, respondents expect that the 55+ population's needs for conventional senior center programs or activities will be minimal, particularly given the wide variety of options currently available to individuals of any age group.

### C. Public perceptions of senior centers

All respondents noted the widespread public perception of senior centers as depressing places where those who are old and frail congregate to play games and pass the time. Although most respondents were in the 55-65 age group, they would never think to visit a senior center, as they don't perceive such to be relevant to their needs or interests. Several respondents shared stories of parents in the 70-75 age range who had visited the Harleysville Senior Center once and, observing its members and activity offerings, dismissed it as "for old people". All respondents agreed that Harleysville Senior Center will need to provide more active programs and change its name if it hopes to attract the county's Baby Boomers.

### D. Potential programs and partnerships

While some respondents were quick to note potential partnerships (including programs with the local school district, hospitals, churches, arts organizations and community college), several

respondents discussed the likelihood that area organizations, particularly senior centers, may not be willing to partner with Harleysville Senior Center as a result of its tarnished reputation.

## FOCUS GROUPS

### Active and Drop-In Users of the Harleysville Senior Center

#### A. Center's most valuable features

Without question, the Center's active members most value its comfortable, home-like atmosphere. The Center is where they go to spend time with their friends, who they've met through their regular participation at the Center, regardless of the particular activities that are being offered as they are seeking companionship and the opportunity to spend their days in spaces other than their homes.

In addition, they find the center's staff to be particularly friendly, welcoming, and accessible and are particularly appreciative of the energy of the Executive Director and the honesty and resourcefulness of the Social Worker. Active members love the lunch program and enjoy participating in the Center's various activities.

Drop-in users, who were generally younger, cited their interest in participating in specific activities that they enjoy rather than spending full days at the Center. The less active members chose not to participate in additional Center activities for a wide variety of reasons: they live at a distance from the Center; they're not interested in the other activities; they perceive some of the activities as too difficult; they're not aware of the special events; there are too few activities for men; and they don't consider themselves a senior.

#### B. Recommendations regarding programmatic improvement

Active members of the Center are very appreciative of its programs and services and don't feel that they need program or facility improvements. However, they do feel that the loss of the bus negatively affects the number and variety of trips that are available to them and have an interest in reviving old programs (such as ceramics) that are no longer offered. Drop-in users would like a wider variety of educational programs, greater detail about existing programs, and more regular updates regarding events and programs.

#### C. Other senior centers in the region

Active and drop-in users are of mixed opinion regarding other centers. The Center's active users were less likely to visit another center. Drop-in users, however, tend to take advantage of trips offered by the area's other senior centers. Overall, participants find the PEAK Center's name change to be very confusing and agree that Harleysville Senior Center offers the best meal program. Most importantly, Harleysville Senior Center feels more like home to them.

#### D. Future of senior centers

Participants wonder whether senior centers will be relevant for seniors of any age group in the future, with many citing the growth of the area's senior communities as particularly harmful for the future of senior centers given that most provide for all of their residents' needs. Participants think senior centers may have been a stop-gap measure or perhaps the precursor to senior communities.

Although many members would like for senior centers to survive, they noted the difficulty of attracting new members, characterizing the senior center as "a hard sell". Seniors of all ages are busy, with many recreational options, church, and family responsibilities. Even those seniors who are already members of the Center aren't using it. Active users think it will be especially difficult to attract Baby Boomers given their desire to be active, their sense that senior center activities are too passive, and their aversion to spending time with older people. As one member noted, perhaps the Center's current membership needs to "die out" before Baby Boomers will think about using it. Nevertheless, the Center's current membership would not have a problem with an influx of Baby Boomers and are open to a name change, although active members feel strongly that the name should convey that it is a place specifically for seniors.

#### Currently working "Baby Boomers" in Harleysville

##### A. Current interests and leisure activities

Participants of both sessions enjoy being active. Popular leisure activities include: motorcycle trips, sports activities, cooking, gardening, traveling, working with computers, making crafts, and socializing. In addition, they enjoy opportunities to learn from and teach others and are generally open to a wide variety of life-long learning opportunities. Despite their wide variety of interests, session participants are currently too busy – with work, families, and life – to participate in many of them.

##### B. Retirement plans

Most participants plan to work as long as they are physically able. After retirement, most plan to stay in the Harleysville area, although expense is a concern. At this time, none of the participants anticipate any desire to reside within a senior-specific community, as they enjoy living among people of many ages and feel too young and active to think about this possibility. However, they do see that senior communities meet the needs of those who are much older (such as their parents).

##### C. Anticipated post-retirement interests

Upon retirement, participants plan to remain active in a wide variety of ways, including: part-time work, volunteering, educational opportunities, trips, fitness programs, opportunities to socialize, and activities that involve the entire family.

##### D. Willingness to engage in senior center activities

Participants don't like being called "senior", even if that is technically true. Most participants have never visited a senior center, with the exception of one who is a member of Harleysville Senior Center. When they hear the words "senior center", participants tend to think of adult day care, very old people, and sedentary activities (such as cards and bingo).

Participants expressed interest in the programs that the Center currently offers (particularly trips, bowling, and crafts) but noted that they cannot participate in such activities at the current time because they are offered only during business hours.

In addition to the activities noted above, participants would hope to encounter the following services through senior centers: information on issues that affect the elderly, access to community resources (including assistance with taxes, lawyer recommendations, and nurses), and access to experiences (cultural events, museums, sports events, etc.) at a discounted rate. Particularly appealing features of this center include: professional staff (including teachers who are paid to teach classes), diverse membership, clean and modern facilities, community visibility, transportation to and from the center for those who do not drive, and an extremely wide variety of activities.

Participants believe they are most likely to learn about current and future senior center opportunities through their workplace.

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## MISSION AND POSITION

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### Mission<sup>2</sup>

To maximize the well being of area residents 55+ by providing access to programs, services and resources that promote health, continuous learning, growth and discovery.

### Position<sup>3</sup>

Harleysville Senior Center<sup>4</sup> will be North Penn's resource for information and social services for older, less mobile seniors. Services and programs will be offered through an attractive, welcoming, accessible facility in Harleysville, as well in the homes and apartments of older, less mobile seniors who lack the financial resources or informal supports to secure help through other means. At the same time, *Encorps Experiences* will be known as a local North Penn resource for anyone 55+ seeking to be involved in the community and the world through good works.

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<sup>2</sup> A mission statement articulates an organization's overarching goal in a way that clearly defines the work and helps guide internal decisions.

<sup>3</sup> A position statement describes an organization's unique features and conveys the value it adds for stakeholders.

<sup>4</sup> To be re-named.

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## TARGET MARKETS

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Harleysville Senior Center will target two distinct markets for its center-based services and community-based programs over the next three years.

### Center-Based Services

The target market for center-based services includes North Penn's 70+ population. Specifically, Harleysville Senior Center will target:

1. Current members
2. 70+ North Penn residents who live independently in their own homes and cannot afford market-rate programs and amenities
3. 70+ North Penn residents who live independently in low-income continuing care retirement communities that do not have community centers or social service components
4. Families of the above

### Community-Based Programs

The target market for community-based programs is 55-70 year olds in the broader North Penn area, including:

1. 55+ individuals caring for their aging parents
2. 55+ individuals seeking meaningful opportunities and enriching experiences

**Goal One. Transform Center-based services to become the senior center of choice for older, less mobile people living in their own homes throughout North Penn.**

***BACKGROUND***

Although the growth of North Penn’s 70+ population will be slower than that of the 55-70 age group, the number older, less mobile seniors will still be increasing. This segment of the population will have a significant need for an array of supportive services both in congregate settings and in their own homes in order to maximize their well being, quality of life and opportunity to remain living independently in the community.

The BoomerANG study suggests that area senior centers consolidate and/or specialize in serving specific cohorts and needs of different segments of the County’s 55+ population. Building on this recommendation, Harleysville Senior Center will leverage its core competencies of serving those who are older and less mobile by seeking to become the provider of choice to older, less mobile North Penn residents who still live independently. The Center will engage in conversations with other area senior centers, the County, and local funders to effect a different division of responsibilities among the current senior centers, thus allowing the region’s providers the opportunity to refine their respective program mix and service delivery models to reflect their own goals and core competencies. Harleysville Senior Center, in turn, would refer individuals more appropriate to other service providers to those respective organizations<sup>5</sup>. In so doing, the North Penn centers would function more as a system and less as individual organizations offering overlapping services.

The Center will: expand its Center-based<sup>6</sup> programs and activities to promote lifelong learning and well being amongst its members; plan for the extension of support services to low-income retirement communities and/or apartment complexes with high concentrations of older adults who live independently and lack access to social services; and explore providing additional assistance to meet the expanded needs of less mobile center members participating in center-based activities (i.e., bathroom or meal assistance). Within the next three years, North Penn’s older adult population and their families will come to regard Harleysville Senior Center as the county’s primary resource for adults 70+.

***STRATEGIES***

1. Work with key local funders to convene the other aging services providers in North Penn to create a more unified service delivery system wherein Harleysville Senior Center evolves into the senior center for the region’s older and less mobile seniors.

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<sup>5</sup> Those who wish to participate in Harleysville Senior Center programs will be able to do so, even if other senior centers offer programming that is more appropriate to their needs and interests. However, over time, Harleysville Senior Center will design and market its programs to appeal to those who are older and less mobile understanding that the region’s other senior centers will design and market their programs to those who are younger and more active, in accordance with their own core competencies.

<sup>6</sup> The center-based operating division should change its name to avoid use of the term “senior center” and signal its broader geographic reach.

2. Explore expanding into the area of home-based services for older, less mobile seniors, to include people living independently in their own homes (or with family members) and people living independently in apartment buildings/complexes which do not offer social services.
3. Explore expanding assistance offered at the center (to include bathroom and/or meal assistance.)
4. Offer seminars and support in workplaces, faith congregations, libraries, etc., regarding how to care for an aging parent<sup>7</sup>.
5. Modernize the facility to make it more appealing and to accommodate programmatic growth and diversification.
6. Seek philanthropic support to serve as the working capital for this transition, while pursuing public funding focused on keeping frail elderly people out of institutional living settings to pay for these services over the longer-term.

***APPROACH***

<b>TASKS</b>	<b>YEAR &amp; QUARTER TO BEGIN</b>
1. Work with key area funders to convene North Penn aging services providers to work as an ad hoc group to develop a plan through which the senior centers specialize. Seek to create a Memo of Understanding of all parties, and then a work plan for implementation.	Year One, Quarter One
2. Refine the service mix that would be offered at the center to best serve the older, less mobile seniors of greater North Penn area, possibly to include providing additional assistance.	Year One, Quarter Two
3. Work with agencies throughout the county to develop a strategy to enhance transportation services for seniors who unable to drive to the center.	Year One, Quarter Three
4. Explore need among area employees who are caring for aging parents.	Year One, Quarter Three
5. Evaluate the staffing and organizational changes that will be needed to accommodate the programmatic changes and anticipated growth.	Year One, Quarter Four
6. Seek the support of Montgomery County Department of Adult and Aging Services to fund the new service mix over the longer-term.	Year One, Quarter Four

<sup>7</sup> By providing information to those who are caring for parents, the organization will reach Baby Boomers who may be interested in Encorps Experiences *and* will provide information relevant to their own future lives.

7. Retain a marketing firm <sup>8</sup> to help develop a new name, logo, web site, and marketing materials targeted to potential clients, their families, funders and area businesses. The firm should also advise on the launch of the “new” center.	Year One, Quarter Three
8. Develop a funding proposal and begin seeking support for working capital from area philanthropies to support the transition.	Year Two, Quarter One
9. Convene an ad hoc group of people (e.g., Human Resource managers at area companies, communications specialists, social service experts, etc.) to develop the general outline of the “caring for your aging parent” series.	Year Two, Quarter One
10. Create a business plan to expand the provision of social services and advice in apartment buildings and complexes with a concentration of older people who live independently but do not have access to a social service component.	Year Two Quarter Two
11. Secure the Township’s concurrence and support to modernize the facility.	Year Two, Quarter Two
12. Secure the services of the Community Design Collaborative or the pro bono services of an architectural firm to re-envision the facility to fulfill its new role.	Year Two Quarter Two
13. Conduct a feasibility study regarding raising the funds needed to modernize the facility.	Year Two, Quarter Four
14. Pilot the ‘caring for your aging parent’ seminar(s) to test response and refine the material and the overall marketing of the series.	Year Three, Quarter Two
15. If deemed feasible, undertake a capital campaign to modernize the facility.	Year Three, Quarter Two

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<sup>8</sup> Use of a marketing firm is described in all three goals in the plan. The same firm should be retained to assist with this work as a package.

**Goal Two. Establish *Encorps Experiences*<sup>9</sup> to enhance the sense of community and connection among people ages 55+ by offering meaningful opportunities to participate in civic life.**

## ***BACKGROUND***

Currently, adults over the age of 50 comprise nearly 1/3 of Montgomery County's population. As the BoomerANG Project outlines, between 2000 and 2015 the number of older adults in Montgomery County will continue to grow as its Baby Boomer population ages. Montgomery County will experience the most significant expansion of its older adult population during the 2003-2008 period.

National research and local feedback indicate that aging Boomers place great value on their continued independence and self-sufficiency and plan to continue working well past retirement age. Perhaps more importantly, this population does not see itself as "old", nor does it perceive senior centers as relevant to their current or anticipated needs or interests. As these individuals age, they would like to engage in activities that enrich their lives and those of the people around them.

Harleysville Senior Center is well-positioned to leverage its strong connections with county agencies and local corporations to launch a program that will provide the county's 55+ population with meaningful opportunities to utilize their professional skills to develop connections with their own and new communities. As the information source for adults ready to make a difference in North Penn and the world, Harleysville Senior Center will be a clearinghouse of information and opportunities for older adults who want to enrich their worldview through new experiences, to include volunteer opportunities in other parts of the United States and abroad.

It is acknowledged that other providers recognize this opportunity and are in different stages of planning and execution to address a similar opportunity. These include Temple University's *Coming of Age*, the Indian Valley Center, the Montgomery County Foundation, the United Way, not to mention other local and national nonprofits seeking to attract the growing 55+ market to their causes. Planning for this initiative will remain cognizant of these, with the specifics of the program design evolving as partnerships with others and the ability to refine a niche take shape.

## ***STRATEGIES***

1. Establish and brand *Encorps Experiences* as Harleysville Senior Center's signature program for active adults ages 55+ in North Penn by linking them to volunteer and civic engagement opportunities.
2. Seek institutional<sup>10</sup> philanthropic support to serve as the working capital for this work, while developing a revenue portfolio to include fee-for-service income, corporate sponsorships, and individual donor support.

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<sup>9</sup> The community-based entity's name should reflect Boomers' interest in engaging in meaningful experiences during the second half of their lives.

## APPROACH

TASKS	YEAR & QUARTER TO BEGIN
1. Register the name <i>Encorps Experiences</i> .	Year One, Quarter One
2. Seek philanthropic support to hire part-time staff or consultant support to support the Executive Director in developing this new line of work.	Year One, Quarter One
3. Conduct additional research regarding the current and future plans of other entities in Montgomery County that are developing civic engagement and volunteer programs focused on people ages 55+.	Year One, Quarter Two
4. Convene an ad hoc planning group of experts in the area of civic engagement, service learning, workforce development, retirement planning, etc. from both Montgomery County and beyond to refine <i>Encorps Experiences</i> ' niche based upon what is learned through the competitor and substitute analysis, above.	Year One, Quarter Three
5. Develop a concept paper to use in seeking working capital from philanthropy to underwrite the start-up costs for <i>Encorps Experiences</i> .	Year Two, Quarter Two
6. Create a new position to oversee <i>Encorps Experiences</i> , seeking someone with business development and marketing experience.	Year Two, Quarter Four
7. Retain an independent evaluator to determine the efficacy and benefits of <i>Encorps Experiences</i> to be able to substantiate the case for support and participation in the program.	Year Three, Quarter Three
8. Expand the series based upon what is learned.	Year Three, Quarter Four
9. Work with a marketing firm to promote <i>Encorps Experiences</i> on a greater scale.	Year Three, Quarter Four
10. Pursue fee-for-services, corporate sponsorship, public funding and philanthropic support to sustain <i>Encorps Experiences</i> .	Year Four, Quarter One
11. Evaluate what type of physical space is needed for <i>Encorps Experiences</i> staff and programming based upon its anticipated scale and program mix.	Year Four, Quarter One

<sup>10</sup> Foundations, corporate giving programs, the United Way.

**Goal Three. Build a strong organization capable of serving the needs and interests of people 55+ in North Penn.**

***BACKGROUND***

Harleysville Senior Center will transform and strengthen its infrastructure to successfully implement its new programs. The organization will create a new organizational structure, renamed<sup>11</sup> to reflect its broader purpose and signal its expanded geographic reach. It will be governed by a re-configured board of directors comprised of civic and corporate leaders from the broader North Penn community. The renamed entity will house two distinct operating divisions: one providing center-based services to existing members and demographically similar older adults (as described in Goal One) and the other engaging the county’s “younger old” through community-based programs (as described in Goal Two). The separate operating divisions will enjoy the guidance of distinct boards of advisors to include social service, marketing, and educational professionals.

As the renamed entity launches the two operating divisions, it will reorganize staffing patterns in ways that build on the strengths of Center’s current staff to meet its future goals. Additional funding will need to be secured to support additional staff hired to implement new and expanded programs.

While the Center’s location and size are well-suited for its current and future needs, the successful implementation of the strategies outlined in this plan will require alteration and improvement beyond the building’s 2007 facelift.

***STRATEGIES***

1. Retain a marketing firm to advise on Harleysville Senior Center: a) renaming the organization and its center-based services; b) revising its web site; c) developing a new logo; and d) re-introducing the organization’s center services and *Encorps Experiences*.
2. Build a board of directors of civic and corporate leaders from the broader North Penn community.
3. Create two advisory boards to oversee the two operating divisions, drawing upon the current board of directors for the center-focused advisory board.
4. Re-align Harleysville Senior Center’s staff structure and add personnel as needed to oversee the new initiatives and to allow the Executive Director to devote at least 75% of her time on externally-focused activities (e.g., partnerships, donor relations, resource development, new business development).

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<sup>11</sup> The entity’s new name should reflect its broader purpose and signal its expanded geographic reach.

**APPROACH**

<b>TASKS</b>	<b>YEAR &amp; QUARTER TO BEGIN</b>
1. Work with legal counsel to determine if the by-laws need to be altered to expand the board of directors and establish the two advisory committees.	Year One, Quarter One
2. Utilize the process described below to expand the board of directors.	Year One, Quarter One
3. Develop and implement a board orientation and development program to engage the newly constituted board of directors (to meet quarterly, with committee meetings in intervening months).	Year One, Quarter Three
4. Develop a document detailing the purpose, roles and responsibilities of the newly created Center services Advisory Board.	Year One, Quarter Three
5. Convene the first meeting of the Center services Advisory Board (to meet quarterly).	Year One, Quarter Four
6. Retain a marketing firm to advise on renaming the organization and the senior center, revising its web site and the launch of the new programs and focus.	Year One, Quarter Three
7. Create an Advisory Board of professionals to oversee <i>Encorps Experiences</i> once it is operational. This may include people who served on the Ad hoc committee (see Goal Two, above) advising on its initial development.	Year Three, Quarter Two
8. Monitor for the appropriate time (level of work, funding availability) to create a senior operations position to oversee internal operations to allow the Executive to devote the preponderance of her time to external relationships and development.	To be determined

## Board Development Process

1. Determine which Board members are best suited for the Center Advisory Board and which are best suited to be on the Board of Directors. Identify the additional skill sets, knowledge and access that the expanded Board of Directors will need to successfully implement this plan.
2. Identify and compile a list of civic leaders (corporate, public sector, nonprofit sector, philanthropy, etc.) in Harleysville Senior Center's current and expanded geographic markets who come in contact with other leaders who have the skills, knowledge and access sought for the board.
3. Convene two breakfast meetings with ten to fifteen of these civic leaders, not to ask them to consider serving on the board, but to brief them about Harleysville Senior Center's vision and plans and to ask that they collectively generate a list of names of people who Harleysville Senior Center should consider for its board.
4. Create a master spreadsheet that lists the names of possible board members generated at the breakfast meetings and through other referral mechanisms. The spreadsheet would include: the prospective board member's name, contact information, referral source, lead Harleysville Senior Center contact and a column for remarks and status of outreach to each individual.
5. Prioritize the list of names. Initiate outreach efforts and meetings with these individuals. Based upon the outcome of these discussions, prioritize the group of individuals who should be sought for board membership.
6. Based upon the outcome of these discussions, work with the Executive Director to prioritize the group of individuals who should be sought for board membership.

## APPENDIX A: CONSOLIDATED TIMELINE

<b>YEAR ONE</b>	
<b>Task</b>	<b>Quarter to Begin</b>
1. Convene funders and North Penn aging services to develop a plan through which the senior centers specialize. Seek to create a Memo of Understanding of all parties, and then a work plan for implementation.	Quarter One
2. Register the name <i>Encorps Experiences</i> .	Quarter One
3. Seek philanthropic support to hire part-time staff or consultant to support the Executive Director in developing this new line of work.	Quarter One
4. Work with legal counsel to determine if the by-laws need to be altered to expand the board of directors and establish the two advisory committees.	Quarter One
5. Utilize the process described above to expand the board of directors.	Quarter One
6. Refine the service mix that would be offered at the center to best serve the frail elderly of greater North Penn area.	Quarter Two
7. Conduct additional research regarding the current and future plans of other entities in Montgomery County that are developing civic engagement and volunteer programs focused on people ages 55+.	Quarter Two
8. Work with other stakeholders to develop a strategy to enhance transportation services for those whose lack of mobility makes them unable to drive to the center.	Quarter Three
9. Explore need among employees in area companies who may be caring for an aging parent.	Quarter Three
10. Convene an ad hoc planning group of experts in the area of civic engagement, service learning, workforce development, retirement planning, etc. from both Montgomery County and beyond to refine <i>Encorps Experiences</i> ' niche based upon what is learned through the competitor and substitute analysis, above.	Quarter Three
11. Retain a marketing firm <sup>12</sup> to help develop a new name, logo, web site, and marketing materials targeted to potential clients, their families, funders and area businesses. The firm should also advise on the launch of the "new" center.	Quarter Three
12. Develop and implement a board orientation and development program to engage the newly constituted board of directors (to meet quarterly, with committee meetings in intervening months).	Quarter Three

<sup>12</sup> Use of a marketing firm is described in all three goals in the plan. The same firm should be retained to assist with this work as a package.

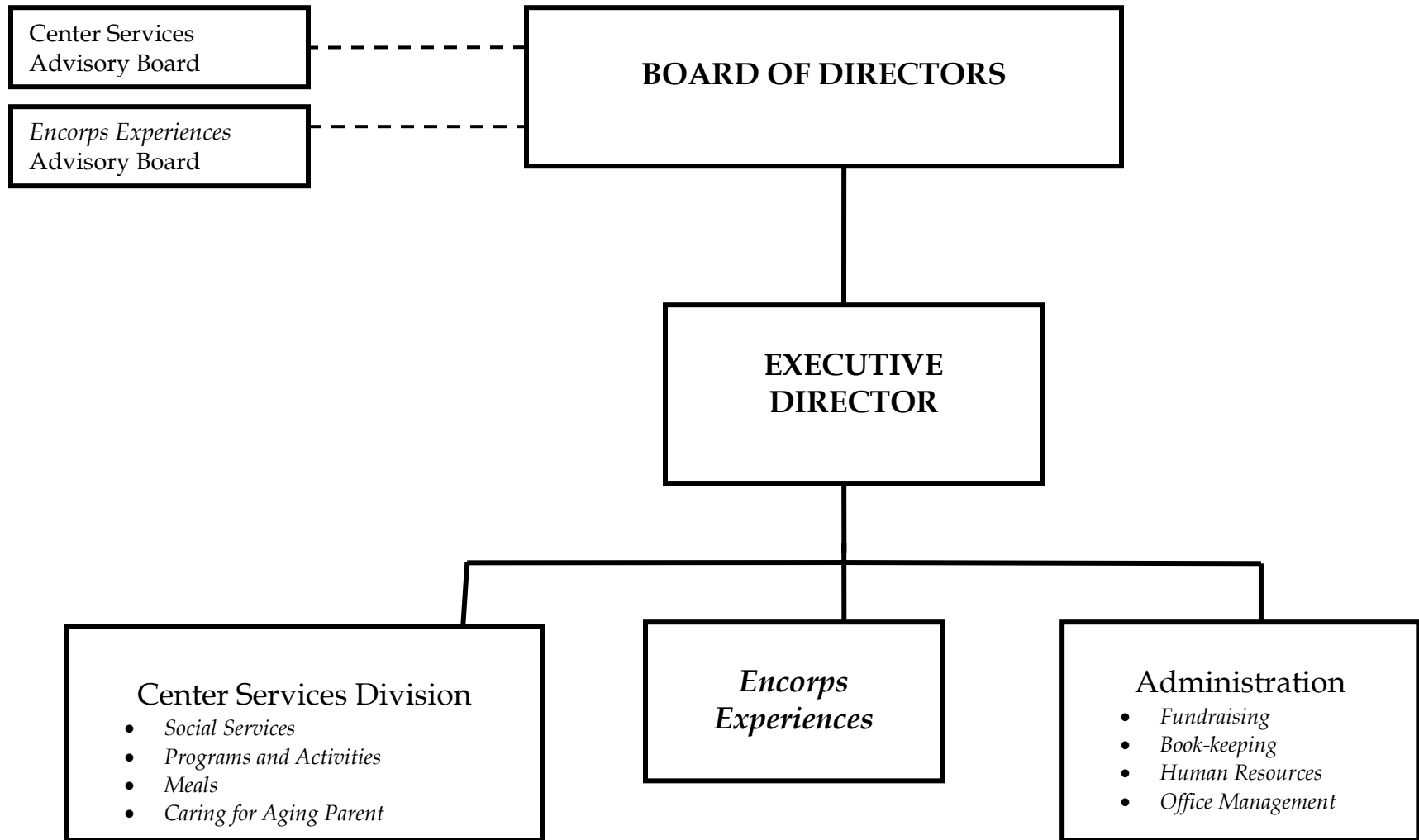
13. Develop a document detailing the purpose, roles and responsibilities of the newly created Center services Advisory Board.	Quarter Three
14. Retain a marketing firm to advise on renaming the organization and the senior center, revising its web site and the launch of the new programs and focus.	Quarter Three
15. Evaluate the staffing and organizational changes that will be needed to accommodate the programmatic changes and anticipated growth.	Quarter Four
16. Seek the support of Montgomery County Department of Adult and Aging Services to fund the new service mix over the longer-term.	Quarter Four
17. Convene the first meeting of the Center services Advisory Board (to meet quarterly).	Quarter Four
<b>YEAR TWO</b>	
<b>Task</b>	<b>Quarter to Begin</b>
1. Develop and circulate a proposal for working capital from area philanthropies to support the transition.	Quarter One
2. Convene an ad hoc group of people (e.g., Human Resource managers at area companies, communications specialists, social service experts, etc.) to develop the general outline of the “caring for your aging parent” series.	Quarter One
3. Create a business plan to expand the provision of social services and advice in apartment buildings and complexes with a concentration of older people who live independently but do not have social services available in their building/complex.	Quarter Two
4. Secure the Township’s concurrence and support to modernize the facility.	Quarter Two
5. Secure the services of the Community Design Collaborative or the pro bono services of an architectural firm to re- envision the facility to fulfill its new role.	Quarter Two
6. Develop a concept paper to use in seeking working capital from philanthropy to underwrite the start-up costs for <i>Encorps Experiences</i> .	Quarter Two
7. Conduct a feasibility study regarding raising the funds needed to modernize the facility.	Quarter Four
8. Create a new position to oversee <i>Encorps Experiences</i> , seeking someone with business development and marketing experience.	Quarter Four
<b>YEAR THREE</b>	
<b>Task</b>	<b>Quarter to Begin</b>
1. If deemed feasible, undertake a capital campaign to modernize	Quarter Two

the facility.	
2. Pilot the ‘caring for your aging parent’ seminar(s) to test response and refine the material and the overall marketing of the series.	Quarter Two
3. Create an Advisory Board of professionals to oversee <i>Encorps Experiences</i> once it is operational. This may include people who served on the Ad hoc committee 4. advising on its initial development.	Quarter Two
5. Retain an independent evaluator to determine the efficacy and benefits of <i>Encorps Experiences</i> to be able to substantiate the case for support and participation in the program.	Quarter Three
6. Expand the series based upon what is learned.	Quarter Four
7. Work with a marketing firm to promote <i>Encorps Experiences</i> on a greater scale.	Quarter Four
<b>YEAR FOUR</b>	
<b>Task</b>	<b>Quarter to Begin</b>
8. Pursue fee-for-services, corporate sponsorship, public funding and philanthropic support to sustain <i>Encorps Experiences</i> .	Quarter One
9. Evaluate what type of physical space is needed for <i>Encorps Experiences</i> staff and programming based upon its anticipated scale and program mix.	Quarter One
10. Monitor for the appropriate time (level of work, funding availability) to create a senior operations position to oversee internal operations to allow the Executive to devote the preponderance of her time to external relationships and development.	To be determined

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**APPENDIX B: ORGANIZATION CHART**

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## APPENDIX C: KEY INFORMANT LIST

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Fairmount Ventures, Inc. interviewed the following individuals as part of Harleysville Senior Center's strategic planning process.

### Internal

1. Robin Burstein, Executive Director
2. Kay Pagni, Assistant Director
3. Susan Anderson, Social Services Coordinator
4. Pat Crompton, Office Manager
5. Chris Yensan, Administrative Assistant
6. Bobbie Kepler, Congregate Meal Coordinator
7. Jamie Frees, Board Member
8. Charlotte Rosen, Board Member
9. Anna Crouse, Board Member
10. Regina Alderfer, Board Member
11. Bob Schoen, Board Member
12. Gladys Cavella, Board Member
13. Mark Hoffman, Board Member
14. Ted Fernes, Board Member

### External

15. Russ Johnson, North Penn Community Health Foundation
16. Joanne Kline, Montgomery County Adult and Aging Services
17. Amy Cummings Leight, PEAK Center
18. Doug Esbach, Indian Valley Senior Adult Activity Center
19. Ron Geib, Harleysville Savings Bank
20. Mark Cummins, Harleysville Group
21. Audrey Attrill, Harleysville Group
22. Ann Bucci, Fourjay Foundation
23. Michael Toth
24. Diane Koehler, North Penn United Way
25. Betty Linko, Indian Valley YMCA
26. Alisha Fergus, Indian Valley YMCA
27. Ed Savitsky
28. Victoria Bastecki-Perez, Montgomery County Community College
29. Joe Landis, Peaceful Living
30. Frank Gallagher, Souderton Area School District
31. Ken Byler
32. Regina Stark, Harleysville National Bank
33. Karen Blaine, Retired Seniors Volunteer Program

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## APPENDIX D: ABOUT FAIRMOUNT VENTURES, INC.

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This plan was produced by Fairmount Ventures, Inc. (Fairmount), a Philadelphia-based consulting firm consisting of sixteen (16) professional staff with diverse academic and professional experience. Formal academic training among the staff includes business and finance, city planning, public policy, social welfare policy, human service delivery, education, healthcare, communications and evaluation. Fairmount's inter-disciplinary team focuses exclusively on non-profit and public sector organizations working in the areas of human services, economic development, community development, behavioral and physical healthcare, and affordable and supportive housing. Since its inception in 1992, the firm has served more than 225 organizations and raised over \$350,000,000. Clients range in size from small, community-focused organizations to large nonprofit institutions and public agencies.

### Contributing Staff:

Don Kligerman, President  
Nicole Meyenberg, Associate

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