



# NORD-BRIDGE STRATEGIC PLAN 2017 - 2020



October 2017

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## Executive Summary:

In the fall of 2016 the Nord-Bridge Board established an Operational & Strategic Planning Subcommittee to develop a 3-5-year plan of action for the future of Nord-Bridge. Extensive information was provided to the Committee by Consultant R. Bruce Thurston, Management Resource Services; and Ms. Dawn Vickers from the City of Lethbridge, Community & Social Development Department. Over a one-year period the committee met to learn about the changing senior sector, programs and core services being offered by other centres. Several sources were provided to assist the committee through the strategic process.

## Steps in the Strategic Planning Process

**External Factors** – A review of the environment that shapes the Centre’s future needs.

- Senior Trends
- Senior Centre Trends
- Stakeholder Analysis
- Community Survey (to be completed in conjunction with the City of Lethbridge and U of L)

**Internal Factors** – An assessment of Nord-Bridge as an association.

- Members Survey – completed in the Fall of 2016
- Program Review – completed by David Ng
- Risk Assessment – completed by the Strategic Planning Committee, facilitated by Dawn Vickers
- Financial Outlook – presented by Randy Smith

**SWOT Analysis:** Based on the External and Internal Factors the committee developed a SWOT Analysis. A summary of the Internal Strengths and Weaknesses of Nord-Bridge and the EXTERNAL opportunities and threats that influence the environment that Nord-Bridge operates within.

A draft VISION has been identified by the Consultant for discussion, the MISSION has been reviewed considering other senior centre missions, and a set of CORE VALUES have been identified for review by the Subcommittee and Board.

The Strategic Planning Committee met in August 2017 to review all the information that was provided in a summary document by the Consultant and based on the research, and discussion, draft strategic goals and actions have been developed for review.

A significant part of the information provided to the committee was from leading research done by the City of Edmonton, whom are considered current in senior sector knowledge. They have identified 6 (six) Core Services that are required for Senior Centre’s in the future, and are as follows:

<b>Cores Senior Centre Services – City of Edmonton Report</b>
<b>Core 1: Social Services</b> Information and referral, one-to-one supportive counseling, support groups, education, advocacy, outreach and other assistance

<p><b>Core 2: Recreational Programs</b> Physical fitness, mental fitness, creative/arts and social opportunities</p>
<p><b>Core 3: Nutrition Services</b> Provides regular access to nutritious and reasonably priced food choices.</p>
<p><b>Core 4: Health and Wellness</b> Regular health related information sessions and referrals to health professionals; could include health seminars such as fall prevention, 'ageing in place' and medication management</p>
<p><b>Core 5: Community Development</b> Collaborate and work with both citizens and other community partners to provide programs and services that meet the needs of seniors that enhance their quality of their life. This could include providing supports to seniors to remain in their home and community.</p>
<p><b>Core 6: Volunteerism Opportunities</b> Provide volunteer opportunities for seniors (both within and outside the centre) and have a plan for volunteer development, management and retention.</p>

Nord-Bridge Board had previously approved “Strategic Objectives” developed by the Executive Director and the Consultant has provided an integrated summary of the Strategic Objectives in comparison to the 6 Core Services in the Appendix.

Nord-Bridge is unique to most of Seniors Centres because of the Association ownership of the building. This adds a unique dimension that other Senior Centres do not need to manage, and the opportunity and challenges are highlighted in the report.

### **Our Vision<sup>i</sup>**

Nord-Bridge, an accredited organization with a solid funding base, is recognized as a leader delivering quality programs and services through the innovative use of volunteers and strategic partnerships.

### **Our Values**

Key to an organization’s strength values that are practiced become a base for the Board to make decisions.

**Compassion:** We care about our community and the people we serve.

**Relationships:** We build strong relationships through open communication and mutual respect.

**Integrity:** We adhere to high moral principles and professional standards.

**Safety:** We promote a safe, inviting and accessible environment.

**Financial Stability:** We plan for the long-term future of our services.

**Innovation:** We encourage the development of new opportunities that build service excellence and community participation.

## Analysis of Nord-Bridge and outside influences that affect the future of Nord-Bridge

The Committee examined the past 5 years and future financial projections and identified the key areas of concern that need to be addressed in the plan. The following list is a summary of input from the committee.

- Changing membership needs of the 55+ baby boomer segment.
- Current membership rate of growth is low (2% net).
- Expenses for an aging building are increasing and will require significant capital in the future.
- Anticipated reduction in gaming revenues.
- Expected reduction in provincial revenues.
- Staff / Volunteer Transition
- Future financial viability based on the facility needs, membership growth and programming needs.

## Strategies

### 1. **Goal - Build intergenerational membership.**

#### **Objective:**

- Encourage membership within the Association, generally by individuals deemed as senior citizens age 55 plus, and by their under-age spouses, partners and family.

### 2. **Goal - Strengthening our member programs.**

#### **Objective:**

- Develop a proactive program approach by identifying innovative community opportunities, program design, and evaluation.

### 3. **Goal – Develop a plan for future needs of the Association and facility needs.**

#### **Objectives:**

- Plan and maintain lands and buildings in a fiscally-responsible manner so that Nord-Bridge can provide social and community programs for its members.
- FACILITY Upgrading – Ensure our members and visitors are served in a safe, convenient, well maintained, purposeful and affordable facility.
- Examine the future viability of the facility with the assistance of external professionals.

### 4. **Goal – Create a strong brand image in the community.**

#### **Objective:**

- Create a brand identity that builds positive community awareness and interest and energy.

“A strategic communications process that helps manage, protect, and enhance the reputation of an organization, its members, and its services.”

**5. Goal - Diversify funding beyond the current revenue sources.**

**Objectives:**

- Develop a Fundraising Program to build a solid funding base.
- Engage in fundraising activities that support Nord-Bridge’s programming and operational needs.

**6. Goal - Build financial stability & enhance administrative effectiveness & efficiency.**

**Objectives:**

- Strengthen the financial skill set at the Board to ensure effective forecasting, budgeting and reporting to the Board.
- Through being nimble and proactive, examine current processes and introduce processes, procedures and policies that will ensure effective and efficient administrative services.

**7. Goal - Advocate for increased recognition of the senior sector.**

**Objective:**

- Through pro-active political advocacy, engage with Municipal, Provincial, and Federal officials to advocate for programs and policies that benefit members of Nord-Bridge, as well as other seniors in the community at-large.

Action Plan Time Frame	2017	2018	2019	2020
Build intergenerational membership. - continuous				
Strengthen our member programs. - continuous				
Future Facility Options – evaluate and plan				
Create a strong brand image in the community. – setup program				
Diversify funding beyond the current revenue sources. – setup program				
Build financial stability and administrative effectiveness & efficiencies.				
Advocate for increased recognition of the senior sector.				

## Strategic Plan Detailed Report

### Background

In 2015 the City of Lethbridge requested that a review be undertaken because of Nord-Bridge requesting additional funding from the City. The review was based on senior centre accreditation standards, as follows:

Standard	Scope
<b>1. Purpose and Planning</b>	The Centre must provide a written statement of the mission of the Senior Centre.
<b>2. Community Connections</b>	The Centre must serve as a focal point in the community and offer information, education, advocacy and opportunities for older adults.
<b>3. Governance</b>	The Centre must be organized to create effective relationships to achieve its goals.
<b>4. Administration and Human Resources</b>	The Centre must have clear policies and procedures that contribute to effective management.
<b>5. Program Development and Implementation</b>	The Centre must offer a broad range of group and individual activities and services that respond to the needs and interests of older adults.
<b>6. Evaluation</b>	The Centre must have appropriate arrangements in place to evaluate its programs and operations.
<b>7. Fiscal and Asset Responsibility</b>	The Centre must practice sound fiscal planning and management, record-keeping and reporting.
<b>8. Records and Reports</b>	The Centre must keep complete records required to plan, operate and review programs.
<b>9. Facility and Operations</b>	The Centre must provide facilities that promote effective program operations and provide for health, safety and comfort.

Based on the report, a recommendation to develop a Strategic Plan was one of the many recommendations made to the Board. The approach taken is as follows:

### Detailed Strategic Steps

#### Senior Trends

The City of Edmonton is leading communities in both research and action within the senior sector. The following is an excerpt regarding the sector, that describes the gaps, barriers and challenges that need to be addressed to meet the needs of the older adults and their communities.

#### **AGEISM**

- Ageism is a critical issue that can lead to isolation and social exclusion. Common narratives that pit the “frail older senior” against the “independent successful senior” leave no middle ground for the complexity of ageing.

- An example of ageism is the negative stigma attached to seniors centres as places for older individuals, which can cause a significant barrier for Baby Boomers (people born between 1946 and 1964) who do not perceive themselves as “old” and resist being associated with the term “senior”.

### **TARGET DEMOGRAPHIC**

- Most current seniors centre users are between the ages of 75 and 84 and are primarily single or widowed women. At Nord-Bridge, most members are age 65 – 75 (representing 43.5% of users). Age 76 – 85 individuals represent 31.4% of users.
- The changing nature of family and retirement, stigmas around ageing, and perceptions of seniors centres as places where ‘old’ people play cards, prevent Baby Boomers (people born between 1946-1964) from using seniors centres. Additionally, many Baby Boomers remain in the current active workforce, and it is anticipated that when this cohort starts retiring, it may be some time before they start attending a seniors centre.
- Clear delineation of target demographic and improved understanding and responsiveness to the demographics and needs of the community they serve will be fundamental to the purpose and programming of future seniors centres.

### **CULTURAL DIVERSITY**

- The seniors demographic has the widest possible range of socio-economic situations, cultural and language backgrounds, family dynamics, life experience, sexualities, and physical and mental capabilities. Yet notions of “sameness” and a “standard senior” persist.
- A key challenge of seniors centres is their capacity to address the needs of seniors from diverse cultural groups.
- Immigrant and refugee seniors have unique needs related to language, isolation, and financial dependency or vulnerability. These needs can be barriers to participation and require expanded outreach programming.
- Promising practices in this area include community support staff working within specific cultural communities and seniors-helping-seniors programs for diverse cultural or linguistic communities.

### **INTERGENERATIONAL PROGRAMMING**

- Current research points to the benefits of inter or multi-generational programming and 75 percent of survey respondents indicated seniors centres should offer these opportunities.
- A considerable number of respondents among the 50-59 age group also cautioned the need for seniors specific spaces.
- Finding a balance of seniors-specific spaces with intergenerational interaction and community-based services is key for the future.

### **SENIORS CENTRES AS COMMUNITY HUBS**

- Currently some seniors centres act as a hub for a spectrum of services, but only for the seniors demographic.
- Research suggests that seniors centres as community hubs could be a way to prevent social exclusion of seniors and more fully embed multi-generational programming and other services in the centre.
- Re-visioning seniors centres as community hubs extends existing programs and services to all community members, providing a central location at the community level.

### **SOCIAL INCLUSION**

- Social isolation and loneliness are critical concerns for the ageing population.
- In Edmonton, the 2015 Older Adult Needs Assessment found a third of respondents indicated they faced barriers to social interactions.
- While seniors centres can play a key role in providing social engagement and connection, variety in programming, more integration of technology and improved communication and partnerships with other organizations will need to increase.

### **VOLUNTEER PROGRAMS**

- The nature of volunteerism is changing and many older adults are increasingly seeking project-based opportunities related to their experience and interests.
- Consideration will need to be given to the kinds of volunteer opportunities and programs offered by seniors centres. For example, a considerable number of survey respondents between the ages of 50-59 state that as they age, they are likely to participate, travel, or volunteer more than they do now.
- When asked to identify the most important program for seniors centres to provide, only five percent of respondents selected volunteer opportunities.

### **HEALTH & WELNESS**

- Seniors centres have a deep understanding of the connections between physical and mental health and social and emotional well-being.
- As such, they straddle both the social service and healthcare sectors.
- Health conditions tend to become more complex as people age, and as life expectancy continues to increase, seniors centres will become more integral to the broader continuum of care.

### **PARTNERSHIP AND COLLABORATION**

- A core theme in the research and public consultation is that partnerships and collaboration are increasingly fundamental to how seniors centres will function.
- Partnerships and collaboration are the way to facilitate more comprehensive supports, minimize duplication and maximize resources.

- However, issues of capacity and leadership as well as concerns about the complex and time-consuming nature of partnership work were raised as concerns to be addressed.

### **CAPACITY AND QUALITY**

- Seniors centres of the future will embrace collaboration, accountability, creativity and responsiveness.
- Research suggests that while flexibility and adaptability are needed in the future, so too is the need for stable and reliable service delivery and strong leadership and planning.
- The research suggests the best way to achieve this balance is with a solid best-practice framework that defines what is possible, while allowing organizations to respond according to community need and organizational interest.
- This framework is more successful than developing prescriptive service requirements for all seniors centres.

### Senior Centre Trends

The City of Edmonton developed an “Active Ageing Framework” that identifies what Senior Centres Programming and Services need to be in the future.

<b>Economic</b>	<b>Social</b>	<b>Health-related</b>
<ul style="list-style-type: none"> <li>○ Diverse range of health, wellness and social service-related programming offered at no or low cost (access)</li> <li>○ Multilingual support to seniors that have immigrated to Canada</li> <li>○ Provide resource information, services and critical support</li> <li>○ Link seniors to other community resources</li> <li>○ Use of outreach to reduce isolation and connect seniors to resources</li> <li>○ Provide assistance with securing safe, appropriate, and affordable housing</li> </ul>	<ul style="list-style-type: none"> <li>○ Foster social inclusion</li> <li>○ Facilitate lifelong learning and community engagement</li> <li>○ Help seniors remain active, engaged, and informed on topics that are relevant to them</li> <li>○ Offer connection to peers with shared interests, opportunities for meaningful contribution and space for relationship building</li> <li>○ Provide informal and formal opportunities for social and emotional support</li> <li>○ Provide opportunities to improve computer skills and extend social reach via the internet</li> </ul>	<ul style="list-style-type: none"> <li>○ Provide programs to meet the demand and need for fitness, creative expression, fellowship and information</li> <li>○ Space for community partners to offer health and wellness related workshops</li> <li>○ Provide access to essential health and wellness-related information and services</li> <li>○ Foster healthy independence and ageing in place</li> <li>○ Promote social integration and active participation in the community</li> <li>○ Community-based approach to ageing that connects health promotion and illness prevention with the social determinants of health</li> </ul>

<b>Behavioural</b>	<b>Personal</b>	<b>Physical (environment)</b>
<ul style="list-style-type: none"> <li>○ Offer a community-based approach to ageing well</li> <li>○ Encourage involvement and self-advocacy</li> <li>○ Enhance quality of life, and support independence and self-determination</li> <li>○ Employ a preventative model that includes access to information and resources related to physical, mental, and emotional health</li> </ul>	<ul style="list-style-type: none"> <li>○ Offer resources, information, and support related to life transitions</li> <li>○ Act as social places of public life</li> <li>○ Provide activities that support independence and encourage involvement</li> <li>○ Positively influence and respond to ageing-related trends</li> <li>○ Foster social inclusion in seniors' home communities</li> </ul>	<ul style="list-style-type: none"> <li>○ Community-based approach to ageing well and ageing in place</li> <li>○ Provide support for seniors seeking safe, affordable, and appropriate housing</li> <li>○ Connect seniors to community resources (e.g. food security)</li> <li>○ Promote and advocate for age-friendly environments</li> </ul>

## Key Characteristics of Senior Centres of the Future

The City of Edmonton's public consultation report identified key characteristics that senior centres should incorporate into the future.

- Ability to appeal to a rapidly changing senior population.
- Capacity to offer culturally and linguistically diverse programs.
- Senior Driven – Thoroughly understand the characteristics of local older adult populations.
- Diverse and inclusive programming that appeals to the broad range of ages and abilities of senior participants.
- Ongoing evaluation of programs and services.
- Easily accessible and close to seniors' neighborhoods, so that it feels like the centre is part of their community.
- Outreach programs that generate awareness of seniors' needs, help to reduce isolation, and address elder abuse.
- Active networking and outreach.
- Grassroots and multiple "stakeholders" involvement.
- Encourage community collaborations that provide a venue for information-sharing, dialogue, and consultation.
- Seniors-Helping-Seniors model that can respond to the needs and challenges of immigrant, refugee, and lower-income seniors.
- Seniors feel as though they belong and are safe no matter what their abilities or disabilities.
- Flexible hours of operation.

## Senior Centres of the Future Core Elements

The City of Edmonton in its Senior Centre Plan 2011-2021 and based on the extensive research developed a framework that identifies six (6) core elements that Seniors Centres need to focus on.

<b>Core 1: Social Services</b>	Information and referral, one-to-one supportive counseling, support groups, education, advocacy, outreach and other assistance
<b>Core 2: Recreational Programs</b>	Physical fitness, mental fitness, creative/arts and social opportunities
<b>Core 3: Nutrition Services</b>	Provides regular access to nutritious and reasonably priced food choices.
<b>Core 4: Health and Wellness</b>	Regular health related information sessions and referrals to health professionals; could include health seminars such as fall prevention, 'ageing in place' and medication management
<b>Core 5: Community Development</b>	Collaborate and work with both citizens and other community partners to provide programs and services that meet the needs of seniors that enhance their quality of their life. This could include providing supports to seniors to remain in their home and community.
<b>Core 6: Volunteerism Opportunities</b>	Provide volunteer opportunities for seniors (both within and outside the centre) and have a plan for volunteer development, management and retention.

### Stakeholder Analysis

The Strategic Planning Committee developed an extensive stakeholder analysis that looked at people and organizations that Nord-Bridge is involved with and the degree of interest and / or power that they have with the association. This analysis identifies who needs to be informed, and influenced in the future. The Committee realized the need to focus on who the Association serves, which contrasts with some organizations that expect others to serve, an inward focus. If these stakeholders are not actively engaged with the Association the ability to operate in the future can be jeopardized.

Summary of High and Medium interest and power of the stakeholders towards Nord-Bridge		Degree of Interest in Nord-Bridge	Power over Nord-Bridge
<b>Association:</b>			
Membership	Services Offered	High	High
Volunteers	Opportunity to volunteer	High	Medium
<b>Government:</b>			
City of Lethbridge	Services & support for seniors	High	High
o Council	Services & support for seniors	Medium	Medium
o CSD Dept.	Services & support for seniors	High	High
AB Supports Centre	Seniors Education	High	Low
MLA Office	Government Services & Legislation	High	Low
CRA	Volunteer Tax Program	Low	High

AB Assoc. of Seniors Centres	Provincial networking and lobby for senior centres	High	Low
UofL Nursing	Specific education experience for nursing	High	Low
<b>Revenue Sources:</b>			
Event Sponsors	Advertising for clients	Medium	High
Medicine Shoppe North	Service Location	High	High
Tenants	Location appropriate for clientele	High	High
<b>Physical Community</b>			
Neighbors	Facility maintained, and activity	High	Low

## Internal Factors

### Members Survey

An assessment of the Association was undertaken by the Strategic Planning Committee over the 2016-17 period. With the assistance of Ms. Dawn Vickers and the use of tools recommended by Ms. Vickers an extensive survey was undertaken to determine the current members needs and wants. The following is a summary of the member survey.

<b>Membership Growth</b>	<ul style="list-style-type: none"> <li>➤ Marketing plan to younger seniors</li> <li>➤ Recruitment of younger volunteers</li> </ul>
<b>Food Services</b>	<ul style="list-style-type: none"> <li>➤ Offer dietary options like gluten-free, low-salt, diabetic</li> </ul>
<b>Facilities</b>	<ul style="list-style-type: none"> <li>➤ Removal/replacement of carpets</li> <li>➤ More open space in reception/lounge area</li> <li>➤ Preventing vehicle damage in parking lot</li> </ul>
<b>Social Service Needs</b>	<ul style="list-style-type: none"> <li>➤ Caregiver support to reduce barriers to participation</li> </ul>
<b>Member Services</b>	<ul style="list-style-type: none"> <li>➤ Saturday Programming</li> <li>➤ Open at earlier hours for access to cafeteria and Fitness Facility</li> <li>➤ Higher intensity activities for active living</li> <li>➤ Strategies to address aging stigma</li> </ul>

### Program Review

A review of member services was undertaken during the strategy process. The purpose is to provide both the Board and staff help make decisions on where to invest more or less time and money, or to help decide if Nord-Bridge should remove service(s) from the portfolio. To determine the current state, an analysis of the current Programs/Projects/Activities is key.

**Assessment of current Programs:**

<b>Program analysis matrix</b>	
<p><b>(1) Stars</b> Strong programs/projects/activities with real potential for growth: dynamic, popular and creative. Stars may become ‘foundation stones’ or become short-lived ‘shooting stars’.</p>	<p><b>(2) Question marks</b> New or innovative projects but not yet proven. They might become stars and move into Square 1. Alternatively, they may fail and move into Square 4; they need to be monitored closely.</p>
<p><b>(3) Foundation stones</b> Reliable, safe projects/programs/activities that provide NORD-BRIDGE with a degree of financial security and/or credibility; they provide a solid base. They may start by being popular with patrons but may become less attractive later as they are not seen as innovative.</p>	<p><b>(4) Dead ducks</b> Take up management and financial resources and provide little or no added value for the effort required. Often NORD-BRIDGE have problems dealing with such activities because they may be closely bound up with NORD-BRIDGE’s earlier history.</p>

**Current Program Assessment**

<p style="text-align: center;"><b>STARS</b></p> <ul style="list-style-type: none"> <li>• Texas Hold'em</li> <li>• Darts</li> <li>• Pool</li> <li>• Table Tennis</li> <li>• Crib</li> <li>• Euchre</li> <li>• Spanish</li> <li>• Seniors Helping Seniors</li> <li>• CVITP</li> <li>• Acrylic Painting</li> <li>• Watercolor Club</li> </ul>	<ul style="list-style-type: none"> <li>• Krafte Koffee Klub</li> <li>• Card Crafters</li> <li>• Tai Chi</li> <li>• Exercise with Arthritis</li> <li>• Fitball</li> <li>• Keep Fit</li> <li>• Chair Yoga</li> <li>• Friendly Geek</li> <li>• Fitness 55 Club</li> </ul>	<p style="text-align: center;"><b>QUESTION MARKS</b></p> <ul style="list-style-type: none"> <li>• Golf</li> <li>• Contract Bridge / Duplicate Bridge</li> <li>• Canasta</li> <li>• Coffee Tea and You</li> <li>• Foot Dr. / Hearing / Legal / LPS etc....</li> <li>• Drawing</li> <li>• Beginners Watercolor</li> <li>• Quilters Group</li> <li>• Line Dancing</li> <li>• Zumba</li> <li>• Somatics</li> </ul>
<p style="text-align: center;"><b>FOUNDATION STONES</b></p> <ul style="list-style-type: none"> <li>• Jam Session</li> <li>• Carpet Bowling</li> <li>• Military Whist</li> <li>• Music Makers</li> </ul>	<ul style="list-style-type: none"> <li>• In-House BINGO</li> <li>• Outreach</li> <li>• Sea ‘N’ Oars</li> <li>• Social Luncheons</li> </ul>	<p style="text-align: center;"><b>DEAD DUCK</b></p> <ul style="list-style-type: none"> <li>• Floor Curling</li> <li>• Shuffleboard</li> <li>• Bocce</li> <li>• Norwegian Whist</li> </ul>

<ul style="list-style-type: none"> <li>• Mind Joggers</li> <li>• Paper Tole</li> <li>• Yoga / Pilates</li> </ul>	<ul style="list-style-type: none"> <li>• Trump Whist</li> <li>• Scrabble</li> <li>• Clogging</li> </ul>
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## Risk Assessment

The 2015 Operational and Strategic Review Report identified the need to perform a risk assessment so the Board can be made aware of current deficiencies, and potential risk to the Association. Ms. Dawn Vickers provided an extensive risk assessment template that the Strategic Planning Committee used with Ms. Vickers facilitation. Overall the Association lacks the required documentation for an operation of its size. Since the assessment, many policies have been formally developed and are currently in draft format. A review of the risk assessment highlighted the following areas that need attention.

<b>RISK Assessment</b>	
Governance	Incorporation & Membership Status
	Board Composition
	Board Self-Management
	Board/Executive Director Relationship
	Risk Management
	Strategic Planning
Administration	Financial Management
	Fund Development
	Facility & Asset Management
	Information Management & Technology
Human Resources	HR Policies
	Hiring Process
	Performance Management
	Compensation & Benefits
	Training & Development
	Volunteers

## Financial Outlook

To plan for future operations, the committee required the development of financial projections as at present. The Executive Director therefore provided a 4-year projection on Nord-Bridge revenues and Expenses. This projection was based on current assumptions.

Revised Budget for  
Strategic Plan, 2018-2019-2020-2021

<b>SUMMARY</b>	<b>Current 2017</b>	<b>Revised 2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
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<b>TOTAL EXPENSES:</b>	\$ 1,177,797	\$ 1,112,000	\$ 1,104,361	\$ 1,128,268	\$ 1,152,542	\$ 1,177,408
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<b>TOTALS REVENUES:</b>	\$ 1,120,383	\$ 1,055,227	\$ 1,030,212	\$ 974,425	\$ 1,024,261	\$ 1,014,690
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<b>TOTAL EXPENSES:</b>	\$ 1,177,797	\$ 1,112,000	\$ 1,104,361	\$ 1,128,268	\$ 1,152,542	\$ 1,177,408
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<b>Projected SURPLUS / DEFICIT:</b>	-\$57,414	-\$56,773	-\$74,150	-\$153,843	-\$128,281	-\$162,718
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Recognizing that Nord-Bridge is unique, in that the Association is responsible for the physical assets, the Executive Director has the additional responsibility of ensuring the facility is rented and managed. Many issues are now impacting the Association and are highlighted in the following sections of this report.

## Back to the Future – The Last 5 Years - Highs and Lows

To plan for the future, the Committee was asked to reflect on the Highs and Lows the Association has had over the last 5 years. Often the past can be a predictor of the future and this tool provides the Committee the opportunity to reflect on patterns that can identify strategies for the future. Themes that were drawn from the analysis indicate the High's have been:

- debt reduction
- funding Increases
- membership and attendance Increase
- programs success

Themes that were drawn analysis indicates the Low's have been:

- funding decrease,
- low membership growth
- inability to attract younger seniors
- uncertain financial future
- relationship with City

	2012	2013	2014	2015	2016
<b>Highs</b>	<ul style="list-style-type: none"> <li>○ Paid off Building Loan</li> <li>○ CFEP Grant</li> <li>○ Membership &amp; attendance increased</li> </ul>	<ul style="list-style-type: none"> <li>○ Grey Matters Conference and surplus</li> <li>○ Building Monitoring</li> <li>○ Go Friendly growth</li> <li>○ Seniors Helping Seniors Tax Program</li> </ul>	<ul style="list-style-type: none"> <li>○ Retired Long Term Debt</li> <li>○ Government Commits to Collaborate with Centres</li> <li>○ City provided additional \$75K</li> </ul>	<p>AASC study recognizes the needs for operational funding</p> <p>Hired part time Member Support Coordinator Pop-Up Health and Community Services Events</p>	<p>Presented Operational Review to Council Starting to develop Strategic Plan Seniors Helping Seniors Income Tax Preparation, and form completion program Growth</p>

	2012	2013	2014	2015	2016
<b>Lows</b>	<p>5% decrease in FCSS</p> <p>Inability to engage boomers</p>	<p>Operations and Programming deficit, Bingo Funds used to offset Operational Funding.</p>	<p>Fund raising down. Deficit increased FCSS funding remained frozen.</p>	<p>Funding for immediate and future repairs an on-going concern</p> <p>PICS study won't be completed till</p>	<p>Operations and Programming deficit, Bingo Funds used to offset.</p> <p>Inability to engage boomers</p>

	Uncertain financial future.	Unable to match government funding with Gaming proceeds offsetting deficit  Regular loss of members through death and aging.	Relationship with Council seems weak.  Having to use funding for consultant	2018  No staff increases  Loss of KFC rent	Uncertain financial future.
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## SWOT Analysis

### SWOT Analysis Internal Factors

After the External and Internal assessments were made the SWOT analysis was undertaken by each committee member who participated and Mr. Robert Tarleck provided a summary of the members input. The Internal Strengths are factors that the Association can be proud of, and provide strength to Nord-Bridge. The Weaknesses are areas that highlight concerns and need to be looked at in future planning.

<b>Internal Strengths:</b>	<b>Internal Weaknesses:</b>
<ul style="list-style-type: none"> <li>▪ Membership loyalty: 36-year growth from 78 to 1310 members.</li> <li>▪ Benefits from an experienced and skilled management and staff.</li> <li>▪ Program Offerings:               <ul style="list-style-type: none"> <li>▪ Nord-Bridge offers a wide range of fitness, crafts, and social programs.</li> <li>▪ The “Seniors-Helping Seniors” and the “Go-Friendly Shuttle” programs are two examples of unique Nord-Bridge programs.</li> </ul> </li> <li>▪ Marketing: Nord-Bridge is very good at word-of-mouth advertising and has begun to make more effective use of electronic marketing, including its web page, to supplement traditional print materials.</li> <li>▪ Finance: Nord-Bridge has successfully used its commercial tenants, its successful pursuit of government grants, and its</li> </ul>	<ul style="list-style-type: none"> <li>• A reliance on Aging Volunteers.</li> <li>• Insufficient personnel for member expectations.</li> <li>• Job descriptions do not appear to have been updated on a regular basis.</li> <li>• A skilled but aging management and workforce operating without a well-thought-out transition plan.</li> <li>• Nord-Bridge has not yet demonstrated that it can be relevant to a new, diverse generation of seniors.</li> <li>• Operational funding from the City was terminated, with funding moved to the Family and Community Support Services envelope.</li> <li>• After 16 years at its present location, the issue of lifecycle repairs has become an urgent concern for the Nord-Bridge Board.</li> <li>• The need for equipment lifecycle replacement is now evident. Should these costs occur simultaneously, or outside the approved annual budgets, Nord-Bridge would be faced with a serious fiscal challenge.</li> </ul>

<p>Gaming revenue to support the Centre. Nord-Bridge also benefits from a skilled Executive Director who has skills related to managing commercial tenants.</p>	<ul style="list-style-type: none"> <li>• Gaming revenues, previously available for Provincially-matched grant programs, are presently being utilized to off-set deficits in General Operations and Programming.</li> <li>• A protracted downturn in the world economy, and/or Alberta’s energy industry, could affect the ability of the Province to provide sustainable funding for senior centres in the future.</li> <li>• Gaming revenues, previously available for Provincially-matched grant programs to assist senior centres in undertaking new construction or renovation projects, are no longer available, as they are presently being utilized to off-set deficits in General Operations and Programming.</li> </ul>
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SWOT Analysis – External Influences

Nord-Bridge is part of the larger community and needs to ensure the relationships that it has with external stakeholders is strong. Often factors such as the economy, legal, political, regulatory, funding come into perspective as the Association is dependent on outside funding sources for survival.

<p><b>External Opportunities:</b></p> <p><b>Funding:</b></p> <ul style="list-style-type: none"> <li>▪ Nord-Bridge must continue to actively pursue capital grants so that it might maintain and/or upgrade its physical plant.</li> </ul> <p><b>Demographic Trends:</b></p> <ul style="list-style-type: none"> <li>▪ The 90% of seniors who are not served by Nord-Bridge represent an untapped source of new members and volunteers.</li> </ul> <p><b>Technology:</b></p> <ul style="list-style-type: none"> <li>▪ Nord-Bridge must expand its use of technology to more effectively market itself, to better communicate to its members and to manage critical information about its members.</li> </ul> <p><b>Partnerships:</b></p> <ul style="list-style-type: none"> <li>▪ Maintain and, when possible, expand community partnerships such as those in place with Scotia Bank, Lethbridge Hearing Centre, Generations Funeral Home, 1<sup>st</sup> Choice Credit Union, and Shoppers Home Health</li> </ul>	<p><b>External Threats:</b></p> <p><b>The City of Lethbridge Connection:</b></p> <ul style="list-style-type: none"> <li>▪ Its relationship with the City of Lethbridge, the gate-keeper of Provincial FCSS funding, seems to lack the enthusiastic support Nord-Bridge would expect.</li> <li>▪ There is a further concern related to a member of Council working for a competing seniors centre, a situation which could put Nord-Bridge at a disadvantage in negotiations with the City.</li> </ul> <p><b>Relevance:</b></p> <ul style="list-style-type: none"> <li>▪ A critical challenge may be to build a connection to a generation of seniors whose first point of reference may not be to a seniors’ centre.</li> </ul>
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**Fitness Centre:**

- With 492 paying members, the Fitness Centre has a potential to both add to the bottom line and to attract new members.

**External Relationships:**

- Extended programing: 48% of those responding to the membership survey indicated they would take part in Saturday programing, should it be offered.

## Mission Review:

The Committee was presented with other examples of Mission Statements provided and it was felt that the current Mission is very similar to other senior sector examples.

### Nord-Bridge Mission

*The provision of educational, social, and support services programs for Senior Citizens and the fostering of independence, self-worth, and a sense of community pride amongst the senior citizen population of Lethbridge, and surrounding communities in Southern Alberta.*

### Goal of the Association

*To be known as the "The Friendly Centre"*

Nord-Bridge has been lacking an overall Vision that can be communicated to the membership and other stakeholders. The Consultant identified for discussion both Vision and Values stated by North York Seniors Centre.

## Our Vision<sup>ii</sup>

Nord-Bridge, an accredited organization with a solid funding base, is recognized as a leader delivering quality programs and services through the innovative use of volunteers and strategic partnerships.

## Our Values

*Compassion:* We care about our community

*Relationships:* We build strong relationships through open communication and mutual respect

*Integrity:* We adhere to high moral principles and professional standards

*Safety:* We promote a safe, inviting and accessible environment

*Innovation:* We encourage the development of new opportunities that build service excellence

***Our members guide our commitment to care.***

## Strategic Themes:

Based on the information gathered by the Committee the August 2017 committee meeting highlighted the following strategic themes from the documents and committee discussion.

### Membership

Current growth of 2% (net) is not adequate to support the Centre's future operating costs. Currently, Nord-Bridge is not attracting younger members, 55+ baby boomers.

### Future Financial Viability

- Revenue is flat and expenses are increasing, resulting in an operating deficit.
- City of Lethbridge \$75,000 – 4-year contribution will end in 2018.
- Financial future is in question based on forecasted financials, with the current operational costs exceeding revenue by \$250K per year.
- Food Services: Currently the services are resulting in a significant loss below breakeven.
- Continuing the same path without growth could result in the same circumstances, of other community organizations of the past like the Labour Club, Elks Club, and the Legion. Or, the Centre may have a building but without the needed membership like the Odd Fellows, and the Army & Navy. Never assume the long term of Nord-Bridge is determined.

### Expenses for an Aging Building

- Building – Tenants provide \$9,200 per month - \$110,400 (Managing the facility and tenants' costs have not be included in the calculation to determine net contribution) equivalent to ½ of the city grant.
- After 16 years at its present location, the issue of lifecycle repairs has become an urgent concern for the Nord-Bridge Board.
- Major renovations and improvements were made in 2001, including the east two-thirds of the Centre, the HVAC systems and the roof. The Community Room and the west end of the building were renovated in 2004, and the Fitness Centre was completed in 2009.
- The need for equipment lifecycle replacement is now evident. Should these costs occur simultaneously, or outside the approved annual budgets, Nord-Bridge would be faced with a serious fiscal challenge.
- Gaming revenues, previously available for Provincially-matched grant programs, are presently being utilized to off-set deficits in general operations and programming.

### Anticipated reduction in gaming revenues

- Gaming revenues have been an important part of the Association's revenue stream throughout most of its history. As these revenues are expected to decline in the future, Nord-Bridge's fiscal outlook needs to reflect this change.

## Expected reduction in provincial revenues

- A protracted downturn in the world economy, and/or Alberta's energy industry, could affect the ability of the Province to provide sustainable funding for senior centres in the future. Gaming revenues, previously available for Provincially-matched grant programs to assist senior centres in undertaking new construction or renovation projects, are being used for operations.

## Staff / Volunteer Transition

- As Nord-Bridge will inevitably be faced with staff transition issues over the next few years, it should develop a Staff Transition Plan. As part of the process of developing such a plan, Nord-Bridge may wish to review and update existing job descriptions.
- Nord-Bridge should develop a recruiting plan for potential Board Members.
- Nord-Bridge Board might also wish to consider adding non-member community representatives to the Board, with the goal of adding diverse, creative voices to better enable the Board to address emerging threats.
- Nord-Bridge board needs to add board members or advisors with financial, legal, marketing and advocacy skill sets.

## Strategies

Strategies have been formulated based on the Themes as follows:

### 1. Goal - Build intergenerational membership.

#### Objective:

- Encourage membership within the Association, generally by individuals deemed as senior citizens age 55 plus, and by their under-age spouses, partners and family.

#### Actions

1. Research the needs and expectations of 55 – 65-year-old baby boomers.
2. Identify groups of potential members: public service baby boomers retiring: UofL, City, LC, Provincial Services, indigenous, ethnic groups, neighborhood groupings, new immigrants.
3. Identify service opportunities for new groups.
4. NEW Member Growth – Ben's Multiplier – reduce current member's fee by \$10 for every new member that they have signed up.
5. Explore promotional opportunity: Ex. An evening of activities and bringing a friend.

During this process identify how new prospects view:

**Centre Image:** the importance of the facility's name Nord-Bridge Senior Centre, 55+, Community Centre, Retirement Transition Centre, to reflect the image that needs to project into the future.

### 2. Goal - Strengthening our member programs.

**Objective:**

- Develop a proactive program approach by identifying innovative community opportunities, program design, and evaluation.

**Innovative Programs**

1. Determine what programs need to be added to the current roster to meet the needs of the younger boomers. Reinvent programs to suit different age groups, to promote the 55+ group? Ex. Golf Simulator, Pickleball, Golf Club 55+, Yoga
2. Identify opportunities to outsource programs and services to reduce costs and provide enhanced member services.
3. Establish a standard of program design, and evaluation as per accreditation recommendations.

**Current Programs**

1. Review Current Programs to ensure that they are current and effective serving members per age grouping interests. Ensure future programming is “nimble” and programs do not become entrenched by few. Ensure members are given flexible opportunities. Change the dynamics of the program so that the programs offered are not poorly attended.
2. **Food Services** – Identify opportunities the food services could provide to ensure it becomes a revenue proposition. Ex. 55+ needs maybe, bulk cooking opportunity for members, concept for members like Meals on Wheels, meal options to different senior groupings, service offerings to other groups, or organizations. Explore restaurant hours to meet new member needs.

**Volunteerism Opportunity** – Ensure every member can participate and rotate the roles and duties to ensure fresh input and a diversity of volunteers able to perform the duties.

1. Research and implement volunteer strategy
2. Bring in new stakeholders (members, non-members, advisors) with ideas and approach
3. Explore the use of committed volunteers to assist in providing services.

**3. Goal** – [Develop a plan for future needs of the Association and facility needs.](#)**Objectives:**

- Plan and maintain lands and buildings in a fiscally-responsible manner so that Nord-Bridge can provide social and community programs for its members.
- FACILITY Upgrading – Ensure our members and visitors are served in a safe, convenient, well maintained, purposeful and affordable facility.
- Examine the future viability of the facility with the assistance of external professionals.

1. Investigate facility options for the future to meet evolving needs, recognizing the current and projected financial conditions. Examine rent vs own.
2. Explore the opportunity of providing services beyond the current physical premise and current operating hours to meet the need of current and future members. For example:
  - Extend the recreation centre hours if required.
  - Extend hours 1 night a week for different programs to test the member and new member interest. Identify Saturday hours amongst members and new member options.

**Transportation** – Identify opportunities currently being incorporated with other centres that provide timely scheduling and tracking.

#### 4. Goal – Create a strong brand image in the community.

**Objective:**

- Create a brand identity that builds positive community awareness and interest and energy

“A strategic communications process that helps manage, protect, and enhance the reputation of an organization, its members, and its services.

1. Seek assistance in public relations to develop a strategy to:
  - Build an image based on the research 55+ are looking for
  - Further Nord-Bridge’s reputation
  - Raise Awareness
  - Educate
  - Increase understanding
  - Change behaviour
  - Build credibility
  - Influence opinion leaders
  - Motivate our stakeholders to action.

#### 5. Goal - Diversify funding beyond the current revenue sources.

**Objectives:**

- Develop a Fundraising Program to build a solid funding base.
  - Engage in fundraising activities that support Nord-Bridge’s programming and operational needs.
1. Train the Association in fund-raising program development by qualified fundraisers. The training will help in:
    - Creating a case for support that will engage why a donor should support the Centre.
    - Identifying sources of fund to be focused on:
      - Trusts and foundations
      - Companies

- Individuals
- Structuring fundraising through a volunteer fundraising committee, fundraiser or outsourced to a consultant.
- Researching specific donors to target
- Creating a value proposition to match the donor interests.
- Solidifying the “Ask” for money.
- Establishing ongoing relationships.

Areas to consider:

- Provide naming opportunities for different areas of the facility.
- Investigate specialized funding:
  - Grants for equipment and facilities
  - Specific programs (senior balance) – i.e. Alberta Health Services

## 6. Goal - Build financial stability & enhance administrative effectiveness & efficiency.

### Objectives:

- Strengthen the financial skill set at the Board to ensure effective forecasting, budgeting and reporting to the Board.
  - Through being nimble and proactive, examine current processes and introduce processes, procedures and policies that will ensure effective and efficient administrative services.
1. Make use of technology and eliminate manual redundancy so staff resources can be spent on adding value.
  2. Focus on INCREASED Revenue, REDUCED Costs
  3. Develop 3-year business plans with revenue and cost targets.
  4. Identify new revenue generators:
    - Government relations – partnership with others like AHS
    - Work with the organization to refer or provide and support
    - Identify partnership opportunity
  5. Identify Cost Reductions:
    - Outsource services that deliver the same or better quality to our members at a lower cost of operation.
    - Eliminate costs without impact
  6. Achieve standards of excellence – address deficiencies as identified in the 2015 report.

## 7. Goal - Advocate for increased recognition of the senior sector.

### Objective:

- Through pro-active political advocacy, engage with Municipal, Provincial, and Federal officials to advocate for programs and policies that benefit members of Nord-Bridge, as well as other seniors in the community at-large.

Develop a planned approach to advocate **on behalf of our Members and the 55+ sector**

Wikipedia: “Advocacy is a political process by an individual or group which aims to influence decisions within political, economic and social systems and institutions.”

1. Obtain Advocacy 101 training for the board and key staff members.
  - Identify best practices for advocacy
  - Train Board member and Staff on the basic strategies for advocacy.
  - Enhance Nord-Bridge’s abilities to advocate for our members to elected officials and policy makers.

## Appendix

Comparative of Cores Services and Nord-Bridge Service Objectives	
Core Services Seniors Centre Plan 2011 – 2021 Core Services City of Edmonton	Nord-Bridge – Core Objectives
<p><b>Core 1: Social Services</b> Information and referral, one-to-one supportive counseling, support groups, education, advocacy, outreach and other assistance</p>	<p><b>Offer In-Reach and Outreach programming</b> for the very elderly, to support the social needs and reduce isolation for this cohort of seniors.</p> <p><b>Provide professional in-house social services counselling, along with referral services</b> to other community supports to seniors.</p> <p><b>Assist</b> Nord-Bridge members, as well as other seniors in the community, <b>in obtaining accurate information about</b> a wide spectrum of <b>government support programs and services</b>.</p> <p><b>Provide tax information and form completion assistance</b> to Nord-Bridge members, as well as to members of the general community, as resources allow. This support can include hands-on assistance regarding tax filing when appropriate.</p> <p><b>Promote</b> the <b>physical, social and fiscal safety</b> of members and work with appropriate local officials, including the Lethbridge Police Service and <b>appropriate support services</b>, with regard to instances of elder abuse.</p> <p><b>Provide a meeting place for the discussion</b> of a wide variety of <b>political, financial, health, and public interest topics</b> relevant to Nord-Bridge members and seniors in general.</p> <p><b>Provide a safe, welcoming environment</b> where Lethbridge and area senior citizens may meet with friends informally and / or <b>participate in a number of socialization, recreation and wellness opportunities</b>.</p> <p><b>Support</b> the provision of <b>affordable and appropriate transportation services</b>, including public transportation services for seniors.</p>
<p><b>Core 2: Recreational Programs</b> Physical fitness, mental fitness, creative/arts and social opportunities</p>	<p><b>Provide</b> Nord-Bridge members with a <b>variety of social activities</b> including entertainment, music, jam sessions, dance and choral programs, special events and dinners with the goal of <b>reducing seniors' isolation</b>.</p>

	<p><b>Offer low cost and / or free drop-in programs and amenities</b> to seniors which include various sports and recreation activities common to seniors, including billiards, shuffleboard, floor curling, carpet bowling, card and board games, and other leisure opportunities.</p> <p><b>Provide</b> Nord-Bridge members with a variety of affordable <b>recreational travel opportunities</b>.</p> <p><b>Provide a safe, welcoming environment</b> where Lethbridge and area senior citizens may meet with friends informally and / or <b>participate in a number of socialization, recreation and wellness opportunities</b>.</p>
<p><b>Core 3: Nutrition Services</b> Provides regular access to nutritious and reasonably priced food choices.</p>	<p><b>Provide affordable, nutritious meal options</b> to seniors in a clean and friendly environment.</p> <p><b>Provide a safe, welcoming environment</b> where Lethbridge and area senior citizens may meet with friends informally and / or <b>participate in a number of socialization, recreation and wellness opportunities</b>.</p>
<p><b>Core 4: Health and Wellness</b> Regular health related information sessions and referrals to health professionals; could include health seminars such as fall prevention, 'ageing in place' and medication management</p>	<p><b>Promote health and fitness of seniors</b> through a variety of classes and sports, and through the provision of an affordable, well-equipped fitness centre serving the senior demographic</p> <p><b>Provide a safe, welcoming environment</b> where Lethbridge and area senior citizens may meet with friends informally and / or <b>participate in a number of socialization, recreation and wellness opportunities</b>.</p>
<p><b>Core 5: Community Development</b> Collaborate and work with both citizens and other community partners to provide programs and services that meet the needs of seniors that enhance their quality of their life. This could include providing supports to seniors to remain in their home and community.</p>	<p>In partnership with other seniors groups in the community, support City of Lethbridge planning and programming for seniors.</p> <p>Build collaborative partnerships with other senior centres and with appropriate community agencies within the greater Lethbridge community, and within the Province when these partnerships are in line with the objects of the Society.</p> <p>Build inter-generational understanding through a number of collaborative partnerships with schools and appropriate agencies.</p>

<p><b>Core 6: Volunteerism Opportunities</b> Provide volunteer opportunities for seniors (both within and outside the centre) and have a plan for volunteer development, management and retention.</p>	<p><b>Support and offer volunteer opportunities for seniors</b> to enhance self-worth, keep seniors active and engaged, and support the betterment of the community.</p>
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<sup>i</sup> North York Seniors Centre, <http://www.nyseniors.org/about/mission-vision/>

The Vision and Values of the North York Seniors Centre were adopted with a few revisions based on the strategy discussion with the committee.

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This Nord-Bridge Strategic Plan 2017 – 2020 was approved by the Association’s Board of Directors, October 11, 2017.