

Orchard House Strategic Plan

**2025-2027
Public Version**



Orchard House's board and staff leaders began meeting in September 2023 to develop the plan for 2025 to 2027, considering the input of families, caregivers, and other partners. The following is the plan we wrote with the support of consultant Nancy Alexander.



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Tagline:



MISSION

To provide programs and medical support that extend independence and happiness among aging adults and their caregivers.

VISION

Aging adults living at home for as long as possible, feeling safe, loved, and appreciated.

GUIDING PRINCIPLES

The values and behaviors that everyone in the organization aims to uphold

- **Compassion** – We promote health, well-being, and care for each individual client and caregiver with empathy and professionalism.
- **Welcoming** – We join in a warm, friendly, nurturing, and safe environment.
- **Dignity and respect** – We promote individuality and acceptance that allow people to experience each stage of life in the least restrictive manner possible.
- **Independence** – We are committed to decreasing isolation and increasing socialization that enhance quality of life.
- **Trust and honesty** – We relate to one another with positive intent.
- **Reliability and integrity** – We hold ourselves to be accountable, dependable, and accessible.

OUR NORTH STAR AND STRATEGIC FOCUS

Our “North Star” goal is to be known and valued by everyone as a vital part of the adult health care system.



We will do so by:

1. Building relationships and partnerships in the healthcare system and the communities we serve while maintaining our organizational independence.
2. Expanding services and activities while increasing access and affordability, particularly for clients from under-served communities.

GOALS

1. Programs and services (health and medication monitoring, personal care, meals, socialization, fun recreational activities, exercise, caregiver support and encouragement) We will provide care, monitoring, transportation, and activities for our clients and their caregivers that promote and extend independence.

2. Visibility and outreach

We will reach out and actively engage with organizations that share our vision.

3. Partnerships and alliances (including Agencies on Aging, VA, community foundations)

We will be widely known for our quality care and programming.

4. Facilities and locations

We will have clean, fresh, modern facilities in locations that meet the needs of our communities.

5. Funding

We will have ample funds from multiple, sustained sources.

6. Organizational effectiveness

We will have the organizational culture, structure, governance, staffing, practices, policies, and accountability that support our continued existence and impact.



Detailed objectives and strategies for each area appear in the next section.

1. Programs and services

We will provide care, monitoring, transportation, and activities for our clients and their caregivers that promote and extend independence.

Objectives

Measure (yardstick)	Baseline	1 Year	3 Years
Increase participation in activities			
Increase census			
Increase net promoter score as measured by quarterly caregiver survey			
Improve quality of life of caregivers as measured by survey			

Strategies

1. Develop and implement innovative programs that slow cognitive decline.
2. Continue to develop ways to engage with families and caregivers, e.g., on-site and virtual support groups; volunteering; workshops; resources.
3. Develop a consistent process for responding to inquiries.
4. Continue connecting youth with intergenerational programs.
5. Develop satellite programs.

2. Visibility, outreach, marketing

We will be widely known for our quality care and programming.

Objectives

Measure (yardstick)	Baseline	1 Year	3 Years
Increase inquiries			
Increase visits			
Increase media exposure, as measured by social media and media coverage			
Increase diversity of client base			

Strategies

1. Develop and implement a targeted marketing plan and budget.
2. Build social platform strategy and presence.
3. Develop messaging to convey the worth of the day center.
4. Develop and maintain a consistent process for responding to inquiries.
5. Hold quarterly meet and greets.

3. Partnerships and alliances

We will reach out and actively engage with organizations that share our vision.

Objectives

Measure (yardstick)	Baseline	1 Year	3 Years
Increase referrals from other organizations			
Increase volunteer base			
Increase advocacy for ADCs			
Increase collaboration among agencies			

Strategies

1. Work with other adult day centers in CT to pool resources for mutual benefit.
2. Work with the AOAs and other adult day centers to advocate for more state funding.
3. Engage with the AOA volunteer program.
4. Develop relationships with other organizations to increase referrals, e.g., Meals on Wheels.

4. Facilities and locations

We will have clean, fresh, modern facilities in locations that meet the needs of our communities.

Objectives

Measure (yardstick)	Baseline	1 Year	3 Years
Enhance current facility			
Upgrade equipment and furniture			
Expand to other locations			

Strategies

1. Develop and implement a plan to expand to other communities.
2. Add a dedicated art studio, music room, and/or sensory room.
3. Create and implement a phased indoor remodeling plan.

5. Funding

We will have ample funds from multiple, sustained sources.

Objectives

Measure (yardstick)	Baseline	1 Year	3 Years
Maintain financial stability	At least break even	At least break even; 1-month cash reserve	At least break even; 6-month cash reserve
Increase # of donors in database			
Increase # of prospects in database			
Increase \$ raised from foundations			

Strategies

1. Develop and implement fundraising strategy and plan.
2. Develop and implement grant application strategy.
3. Hire dedicated fundraising and grant positions with distinct skill sets.
4. Overhaul and add to the donor database.
5. Engage board members as ambassadors.
6. Advocate for Medicare payments.

6. Organizational infrastructure, effectiveness, sustainability

We will have the organizational culture, structure, governance, staffing, practices, policies, and accountability that support our continued existence and impact.

Objectives Increase, decrease, abandon, enhance, achieve, raise, reduce, improve, expand, consolidate, continue, maintain, diversify, broaden—verbs that indicate a direction you’re pointed in.

Measure (yardstick)	Baseline	1 Year	3 Years
Maintain staff satisfaction and engagement as measured by annual survey			
Enhance board effectiveness, as measured by an annual board self-assessment			
Diversify and expand the board			

Strategies

1. Add HR expertise.
2. Explore ways to increase staff benefits and professional development.
3. Update staff policies and procedures.
4. Upgrade IT.
5. Develop and implement a plan for board recruitment and on-boarding.
6. Establish and uphold board expectations.
7. Create a board handbook.

CORE STRENGTHS ORCHARD HOUSE MUST PRESERVE

Quality of care

Staff: knowledge, wisdom, compassion

Relationships with families

Name, reputation (name / branding could change, with caution)

Financial stability

Facility: sun, gardens, proud of maintenance, town-provided

Board: diversity of talents, experiences, ideas

Medical model

Community partnerships

Transportation



EXTERNAL FACTORS Factors beyond Orchard House’s control that have implications for decisions; *revisit and update each year*

Factor	Implications	Strategy
Another pandemic	Inability to serve	
Demographic and attitude changes	OH image More need for services More demand? Less demand for current programming? \$ sustainability	
Fed and state regulatory and political environment: support for aging?	Costs Funding may increase or decrease Different payer sources Medicare/Medicaid pay?	
More Alzheimer’s and Parkinson’s research DDS, DSS	Funding Demand	
More technology required	Individuals: skills; culture shift Organization: cost, staff, culture	
Workforce shortage Work from home More agencies	Effect on medical model	
Economy, inflation	Afford-ability Costs Impact on donors	



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