

# Los Angeles Foundation on Aging 4-Year Strategic Plan



Los Angeles  
Foundation  
On Aging

# From the Board Chair

LAFAs first Four-Year Strategic Plan provides a comprehensive framework to create new and improve existing programs and services that serve seniors in the City of Los Angeles and develops the infrastructure for the Foundation itself. LAFAs was established in 2006 by the City of Los Angeles Department of Aging (LADOA) to enhance programs and services offered to seniors and their caregivers in the City of Los Angeles. As part of the work for the first year of the Foundation, the LAFAs Board of Directors identified the need to create a strategic plan as well as develop a public relations campaign. The California Community Foundation generously funded these two priority areas.

This plan is the culmination of six months of intensive work by staff, Board Members, and an outside consultant. During that period, we analyzed internal and external data and assessments focusing on the needs of seniors in the City of Los Angeles, and looked at other nonprofit models while examining the existing infrastructure of the Foundation. All of this research centered on one critical focus: how best to improve the quality of life of seniors in the City of Los Angeles.

We have looked closely at our potential strengths and vulnerabilities over the next four years, and have decided to focus our programmatic efforts in following areas:

**Funding:** create a broad and diverse funding base to adequately raise funds for and maintain our five program priorities.

**Infrastructure:** invest in establishing staffing and infrastructure.

**Board:** increase Board membership.

**Relationships:** maximize collaborative efforts with other agencies and take a leadership role in convening meetings focused on aging in general, as well as collaborative funding proposals, public policy and advocacy efforts.

The plan includes four major sections:

**Challenges and Opportunities:** Demographic changes.

**Guiding Framework:** Mission, Vision and Values, as well as LAFA's organizational history and profile.

**Program Goals and Objectives:** Specific measures that will act as a roadmap for our program priority areas in the next four years.

**Implementating the Plan:** Specific measures that address administrative, financial and governance goals and objectives for the next four years.

This plan is firmly rooted in our values and in our commitment to stay at the forefront of aging issues. LAFA looks forward to achieving these goals through working with the community to ultimately make the City of Los Angeles a good place to grow old.

Thank you for your interest in LAFA.

Sincerely,

A handwritten signature in blue ink that reads "Sandra King". The signature is written in a cursive style with a large initial 'S'.

Sandra King, President of the Board



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# Challenges and Opportunities

# Challenges and Opportunities



This section presents the current and projected population trends and characteristics of aging in the City of Los Angeles. These trends and characteristics are evidence and support for program priorities. The trends discussed utilized data from 2005 Census and the California Department of Finance.

Information below presents current data for the City, and a basic population projection, there is no projection data specifically for the City. Therefore projection data for Los Angeles County was used. The City of Los Angeles currently represents approximately 40% of the total population of Los Angeles County therefore all City projection data is 40% of the County data.

## Geography

The City of Los Angeles is the second most populous City in the United States, and the largest municipality in the State of California. Los Angeles spans 472.08 square miles and can easily contain the combined areas of Boston, Cleveland, St. Louis, Pittsburgh, Minneapolis, Milwaukee, San Francisco, and Manhattan. This area has diverse urban and suburban communities – the Pacific Ocean bordering on the West and three mountain ranges interspersed in the North and East.

The City of Los Angeles is a major hub of shipping, manufacturing, industry and finance, and is world-renowned in the entertainment and communication fields. Over the past 25 years the City has become a port of immigration that has transformed the City into a multi-cultural mecca. The population is comprised of Mexicans, Puerto Ricans, Cubans, Central Americans, South Americans, Asians, African Americans, American Indians, Alaskan Natives, Native Hawaiians and Pacific Islanders. Additionally, the City ranks as one of the most educated in the country with the U.S. Census reporting that one in four residents in Los Angeles have a bachelor's degree or higher.

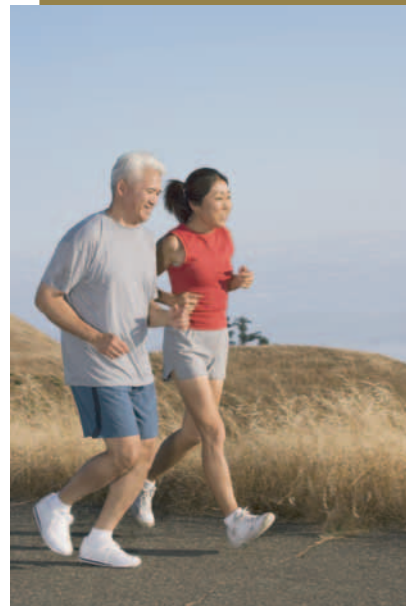
## Demographics

California is one of the fastest growing states in the nation, with the population expected to increase by almost 75% by 2050 compared to a 50% growth rate nationwide. Los Angeles County is expected to have the largest population in the State – 13 million people, of which 5.2 million will be residents of the City of Los Angeles.

In 2010, it is estimated that there will be 622,456 people over the age of 60 in the City of Los Angeles and reaching over one million by 2025. With the oldest old, those 85 and older, representing one of the fastest growing segments of the population. In 2005, there were just over 37,000 seniors who were 85 or older and it is estimated that there will be 100,000 seniors over the age of 85 by 2030. This population boom in the 60 plus population will result in an increase in the amount of services that need to be provided. Additionally, with the large increase in the 85 plus population services for frail and disabled seniors will need to expand. Finally, how services are delivered and the types of services will also need to be modified to meet the characteristics and expectations of the future older adults in Los Angeles.

Those turning 60 in the coming years are part of the baby boomer generation. This cohort's unique characteristics; being better educated, more comfortable with technology, an individualist generation, with a financial status as spenders not savers, more access to age defying products and procedures, will impact not only how services are delivered but the types of services that will need to be developed.

Identifying the needs and creating programs and services which support seniors, caregivers and service providers present a unique set of challenges. While LAFA has identified five program priorities to start addressing these challenges, more will need to be developed for the future. These program priorities focus on the needs of seniors, today, but also anticipate future needs.



# Guiding Framework

# Guiding Framework

This Strategic Plan brings together all of the challenges and opportunities of aging in the City of Los Angeles. In establishing this plan, the foundation-essential elements were established:

## Mission Statement

To enhance the quality of life for older adults and their families in the City of Los Angeles by improving upon and expanding existing services, and supporting new and innovative programs.

## Vision Statement

We envision a city where all older adults and their caregivers have access to the quality health and social services they need, and feel empowered by choice.

## Core Values

Integrity, quality, and excellence in service provision must always be maintained

Through providing information and support, individuals will be empowered to make their own decisions

Services need to fit the senior, rather than seniors having to conform to the services that are made available to them

Access to information creates an environment where older adults and their caregivers can make informed decisions to attain the highest quality of life

Diversity is valued in all that we do. We recognize the diversity of older people and their different needs, choices, cultures and values

Collaboration is essential to maximizing resources and program success





## Organizational History

The Los Angeles Foundation on Aging (Lafa) was founded in 2006 by the City of Los Angeles Department of Aging (LADOA) and a dedicated group of professionals who work on the topic of aging to meet the needs of the growing number of aging residents in the City of Los Angeles. LADOA management, recognized that the City Department of Aging could not expand to meet the needs of the growing number of aging adults in Los Angeles due to government funding cuts and private foundation restrictions on funding government entities. The governing body for the City of Los Angeles, City Council and Mayor, supported LADOA's efforts and approved the establishment of the Lafa. A professional board of directors was recruited, provided in-kind office space, and an in-kind executive from LADOA staff, Erin Westphal, to get Lafa off the ground.

In 2005 Westphal established non-profit status, and in 2006 secured funds for a limited amount of services, and a major grant for the strategic and public relations plan. Lafa currently provides holiday meals (an enhancement of the City home-delivered meals program) and holiday care baskets to seniors in need, with funds from City employee payroll deductions and donations from the community.

Lafa's budget in 2006 was \$45,000, with in-kind support of one FTE and four board members. In 2006 Lafa's revenue was generated from three sources: \$4,400 from the community, \$30,000 from private foundations, and an estimated \$11,000 from the private sector.

## Core Strategies

The following four overarching strategies will form LAFA's goals for the next four years:

### Strategy 1: Funding

The Strategic Plan reflects a commitment to creating a strong and diverse funding base, and aims not to make LAFA vulnerable to budget cuts or dips in the stock market. Over the next four years the Foundation will strengthen support from individual donors, as well as from private foundations, corporations, and government grants.

### Strategy 2: Infrastructure

Increasing capacity to grow programs and maintain quality services is limited by the extent to which we have invested in infrastructure. The strategic plan reflects an investment in staffing and infrastructure through a commitment to setting competitive salaries and benefits, and ensuring sufficient staffing levels. In the next four years, LAFA will decrease its dependency on in-kind staff and infrastructure support from the LADOA.

### Strategy 3: Board

The current LAFA Board was created to establish the Foundation, with the intention of stepping down and recruiting new leadership once LAFA was established. Current Board Members are committed to recruiting new board members, a strong Board of Directors with between five and nine members will provide LAFA with the leadership and resources it needs to grow.

### Strategy 4: Relationships

In order to ensure that LAFA maximizes funding opportunities and to ensure that the aging population is protected, LAFA needs to create a strong leadership role within the Los Angeles community focusing on aging. Recognizing that this leadership cannot be done in isolation, LAFA will work in collaboration with a broad spectrum of private, nonprofit, and public sector agencies.



# Program Goals and Objectives

**Five program goals were identified which support the Foundation's overall goal:**

**To improve the quality of life for older adults and their caregivers through comprehensive, quality support services and information.**

### Home Delivered Meals:

The City of Los Angeles (LADOA) currently provides one hot meal Monday through Friday to home-bound seniors who participate in the Meals on Wheels Program. Currently, LAFA enhances this program with one holiday meal.

Goal: To increase access to nutritious food on weekends and holidays for older adults.

#### Objectives:

By December 2007, provide one holiday meal to 3,000 older adults with limited access to food.

By December 2008, provide two holiday meals to 3,000 older adults with limitations on accessing food.

By December 2008, develop and implement client satisfaction survey and needs assessment for weekend meals.

By December 2011, provide weekend meals for 5,000 older adults in the City of Los Angeles with limited access to food.



## **Project CARE (Caring Actions Responding to Elders)**

LAFAs Project CARE provides needed and quality of life items to low-income seniors throughout Los Angeles. The items include food, clothing, personal hygiene implements, books, craft materials and many others.

Goal: To provide daily and quality of life items to seniors in the City of Los Angeles.

Objectives:

By December 2007, provide needed and quality of life items to 500 seniors in Los Angeles.

By December 2008, provide needed and quality of life items to 500 seniors in the City of Los Angeles twice a year.

By December 2009, provide needed and quality of life items to 500 seniors in the City of Los Angeles three times a year.

By December 2010, provide care baskets four times per year to 500 low-income seniors in the City of Los Angeles, through an established and ongoing fundraising effort.



## Elderly Tenant Hoarding Program

Based on a sampling of seniors in the City of Los Angeles conducted in 2006 it is estimated that there may be as many as 21,000 seniors living in a hoarding-like situation. Hoarding is the excessive collection of items that seem to have limited or no value, such as newspapers or trash, along with the inability to discard them. Hoarding creates such cramped living conditions that entire rooms may be filled to capacity, and homes may be left with only narrow pathways winding through stacks of clutter. Some people also collect animals, keeping hundreds of dogs, cats or other animals in their homes, as filth and waste pile up and the animals become sick.

As part of the Elderly Tenant Hoarding Program, LAFA will support a team of professionals who will assist seniors with the “clean-up” and on-going mental health care and the support they need to keep them content and healthy.

**Goal:** To reduce hoarding behavior among older adults and minimize public health risk due to hoarding.

### Objectives:

By December 2008, establish a new Hoarding program staffed by professional cleaners and a .5 FTE mental health counselor.

By December 2008, develop and implement quality control procedures to ensure that case management services remain of highest quality.

By December 2008, develop and implement evaluation tool for improved mental health among frail seniors displaying hoarding behaviors.

Provide ongoing training appropriate for case manager and cleaners.

By the end of 2010, 30 frail seniors in the City of Los Angeles displaying hoarding behavior will receive heavy clean-up and mental health counseling services.





## Consumer Education: Financial Literacy

Financial literacy is quickly becoming an important aspect of aging. With the introduction of financial tools to support aging (i.e. reverse mortgages, long-term care insurance and other investments) many seniors are making uninformed decisions. To address this emerging need, LAFA will develop a volunteer-based educational and support program for seniors on topics of financial literacy and money management. Topics will include:

Information about accessing resources for seniors in the community.

Long-term care planning (care coordination, caregiving, funeral arrangements, etc.).

Goal: To increase the financial literacy of participating older adults in the City of Los Angeles.

Objectives:

By the end of 2008, establish new Consumer Education Program with a focus on financial literacy for seniors in the City of Los Angeles.

By the end of 2008, develop and implement evaluation tool that demonstrates increased knowledge of financial matters among participating older adults.

By the end of 2010, hire two staff and recruit 80 volunteers to serve 2,000 clients.

Develop and implement quality control procedures to ensure that volunteer advice is accurate and of high quality.

Provide ongoing training for volunteers on new financial developments that will harm/benefit seniors.

Develop and conduct ongoing client satisfaction activities to monitor volunteer financial literacy education, and identify areas for improvement.

On an ongoing basis, update the database of resources and referrals so as to ensure accurate information.

## Research: Impact of an Aging Society in Los Angeles

As the population of older adults increases in the coming years, the public and private sectors need to be prepared to handle greater demands and maximize resources. To accomplish this, we need to understand what this population shift and the resulting needs will be.

The first activity of this program will be to conduct a comprehensive needs assessment of aging seniors in Los Angeles, which will include accurate demographic information, qualitative and quantitative research.

Goal: To provide access to up-to-date and accurate data on aging in the City of Los Angeles.

Objectives:

Establish a research arm of the Foundation with one FTE staff focusing on accurate demographic information and qualitative and quantitative data on seniors in the City of Los Angeles.

Collaborate with research institutions and community agencies.

By the end of 2009, produce first research report and disseminate widely.



# Implementing the Plan

The Board of Directors will provide oversight for implementation of the plan and direct implementation will be provided through in-kind staff support from the LADOA. The success of implementation will hinge on the Foundations ability to not only raise program funds but to also raise funds to establish infrastructure. These include: staffing and benefits, resource development, board of directors recruitment, planning and evaluation, public relations and networking and collaboration.

### **Staffing and Benefits**

Goal: Attract and retain qualified paid and volunteer staff for all services and activities.

#### *Staffing*

By December 2008, assess whether more complex and differing needs of clients require certain jobs that are done by volunteers or paid professional staff.

By 2009, increase number of paid staff from one in-kind FTE to five FTE's to support our ability to provide needed services.

#### *Salaries and Benefits*

By the end of 2008, analyze in-kind donations of salaries and benefits to assess whether to maintain in-kind relationship or support independently.

By the end of 2009, assess overall salary structure and benefits package, and develop a plan to increase staff salaries in concert with the cost of living.

Analyze fringe benefits package on an ongoing basis and identify ways of meeting employee needs (e.g., pension plan, etc.).

#### *Training, Evaluation and Other Support*

By the end of 2008, assess which staff positions require ongoing or additional training, and arrange for appropriate training.

By the end of 2008, create a personnel handbook.

By the end of 2009, implement and maintain a staff evaluation system that establishes overall objectives for positions and specific objectives for all employees.

By the end of 2010, create volunteer and staff appreciation program.

#### *Volunteers*

By the end of 2008, decide upon number of volunteers needed for program maintenance.

By the end of 2008, create volunteer recruitment, orientation, and training program.



## Resource Development

Goal: Acquire stable, broad-based, financial and non-financial resources to support the programs and growth envisioned in this strategic plan.

### *Diversification of Funding*

Within the next four years:

At least 40% of LAFA's annual operating budget will be raised through private sector philanthropy.

Explore in-kind donations (apart from those already in place) to help support services.

Increase individual donations from employee payroll deduction by 10% each year.

Raise \$100,000 in individual donations (separate from payroll deduction).

Raise a minimum of \$50,000 annually from special events and/or fundraisers.

### *Infrastructure Support for Resource Development Function*

By December 2008, establish and maintain a computerized donor history file using professional fundraising software.

By 2009 hire an Executive Director whose primary function during the next four years is fund development.

By 2010 hire a grant writer, as staff or on a consultant basis, as soon as the budget allows or as funds can be raised.

### *Board of Directors Role in Fundraising*

By the end of 2008, create and maintain a Board giving policy that requires all board members to contribute financially to the organization.

Increase Board participation in all aspects of fundraising.

Encourage Board to raise the first year's operating budget. Use this to leverage private foundation grants.



## Board of Directors

Goal: Develop and maintain an effective, active and informed Board of Directors whose governance and support roles help to achieve LAFA's mission.

### *Board Membership*

By December 2008 increase Board membership to five to nine members.

Focus on recruiting Board members who have access to financial resources.

By December 2009, develop and maintain an advisory board to help supplement the Board's expertise and contribution.

### *Board Effectiveness*

By December 2008, develop and maintain a board orientation program, including ongoing training opportunities.

By December 2008, create and implement a board self-evaluation tool.

Implement 100% financial contribution from all board members.

Increase the capability of the board to assist with the following functions: fiscal oversight, marketing, fundraising, legal matters, and public relations.

## Planning and Evaluation

Goal: Guarantee that we meet the needs of our constituency and that all programs achieve high quality service.

### *Long-term Objectives:*

Establish an ongoing evaluation process for all programs to assess program results, quality of services, and the Foundation's ability to address the levels of service to our clients and the community.

Hold an annual board and staff retreat to plan for future needs, assess current capabilities, and evaluate progress on the strategic plan.

Review the strategic plan quarterly and make changes as needed.

Ensure that detailed operating plans are developed for all programs and internal management functions.

Establish and maintain protocols for data collection, data entry, and outcome evaluation.



## Public Relations

Goal: Increase the visibility and community awareness of LAFA, ensure that LAFA is recognized for its achievements and identified as a premier source of services for and information about older adults in Los Angeles.

### *Long-term objectives:*

Build awareness of LAFA in the community through increased media coverage and public service announcements.

Produce and distribute a newsletter on a regular basis.

Update brochures regularly and make sure they are available.

## Networking and Collaboration

Goal: Maintain and develop collaborative relationships with organizations and funders that benefit our community and our foundation.

### *Long-term objectives:*

Allocate time for the Executive Director to identify potential collaborators, negotiate subcontracts and MOU's as appropriate.

Assess collaboration with the LADDOA and develop a plan for continued collaboration with:

- 1). Clearly defined roles and responsibilities
- 2) clearly defined accountability measures,
- 3). Incremental shift toward independence.







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