

Vivalon

connection works wonders

RIDES MEALS CLASSES CARE ADVICE



STRATEGIC PLAN 2022-2027



Our Mission

We advance independence, health,
and quality of life for older adults
and people with disabilities.

Our Core Values



HEART

Honesty

We conduct our business with integrity. We are honest, transparent, and ethical. We do the right thing.

Equity

We are committed to diversity, equity, and inclusion with opportunities for everyone to thrive. We educate ourselves, practice allyship, and seek out all voices and perspectives.

Appreciation

We serve with compassion, value every person we meet, and provide solutions for those we serve.

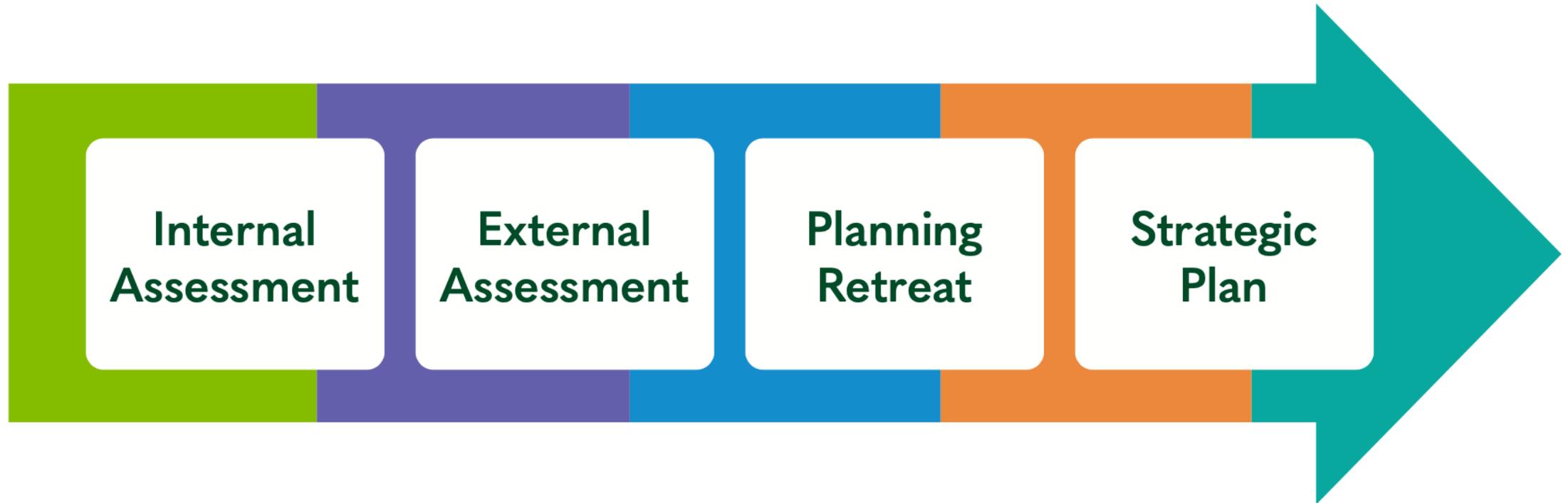
Responsibility

We have a responsibility to make a positive difference in the lives of those we serve. We follow through on our commitments and challenge ourselves and others to do more.

Teamwork

We believe in the strength of collaboration and the sharing of diverse ideas and competencies that foster open communication, trust, and cooperation.

Key Steps to our Planning Process



“Vivalon has an outstanding history, strong relationships in the community, and deep understanding of the needs of older adults, including how to adapt to meet those needs.”

— Vivalon Community Partner

Key Steps to our Planning Process



INTERNAL ASSESSMENT

- Staff Survey
- Board Interviews
- Core Values
- Mission Statement
- Who We Serve
- Business Operations Analysis
- Financial Modeling



EXTERNAL ASSESSMENT

- 30 Stakeholder Interviews
- 250 Client Surveys
- Geographic Focus
- Key Drivers & Disrupters
- County and Client Needs



PLANNING RETREAT

- Healthy Aging Center: Capabilities and Investments
- County and Client Needs
- Commitment to Diversity, Equity, and Inclusion
- Future Strategic Direction



Key Findings

STRENGTHS

- Trusted community partner
- Experience with older adults and people with disabilities
- Community reputation
- Community leadership
- Transportation services

Key Findings

CHALLENGES

- Name change
- Loss of paratransit contract
- Competition for funding
- Lack of awareness about services
- Staff hiring and retention





Key Findings

OPPORTUNITIES

- Partnerships with other nonprofits
- Integrated healthcare model (including mental health)
- New Healthy Aging Campus
- Expansion of transportation
- Growing demand for services

Key Findings

WHAT MAKES VIVALON UNIQUE

- Outstanding reputation
- Wide range of offerings
- Serving the “whole person”
- Mission-focused with a deep understanding of older adults
- Trusted partner
- Go-to organization for seniors and disabled populations
- Fulfilling a big need in the community
- An established icon for transportation

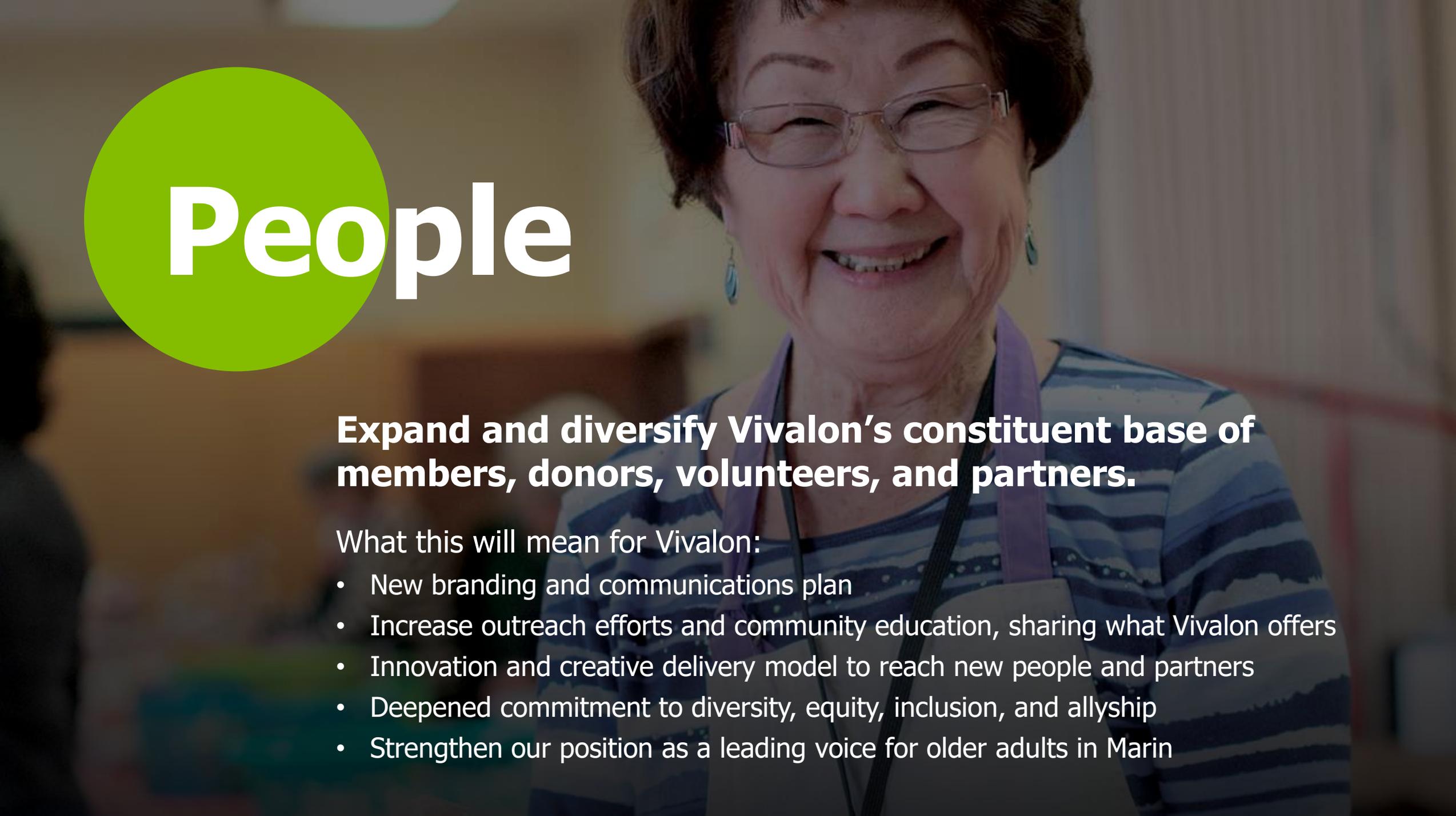


Strategic Direction 2022-2027

Vivalon's five-year strategic direction specifies three interconnected areas of focus — **People, Purpose, and Progress** — that will inspire and guide our work in the coming years.

Under each one, we have further defined what this will mean for Vivalon; driving annual business planning, and evaluation throughout every facet of our organization.





People

Expand and diversify Vivalon's constituent base of members, donors, volunteers, and partners.

What this will mean for Vivalon:

- New branding and communications plan
- Increase outreach efforts and community education, sharing what Vivalon offers
- Innovation and creative delivery model to reach new people and partners
- Deepened commitment to diversity, equity, inclusion, and allyship
- Strengthen our position as a leading voice for older adults in Marin

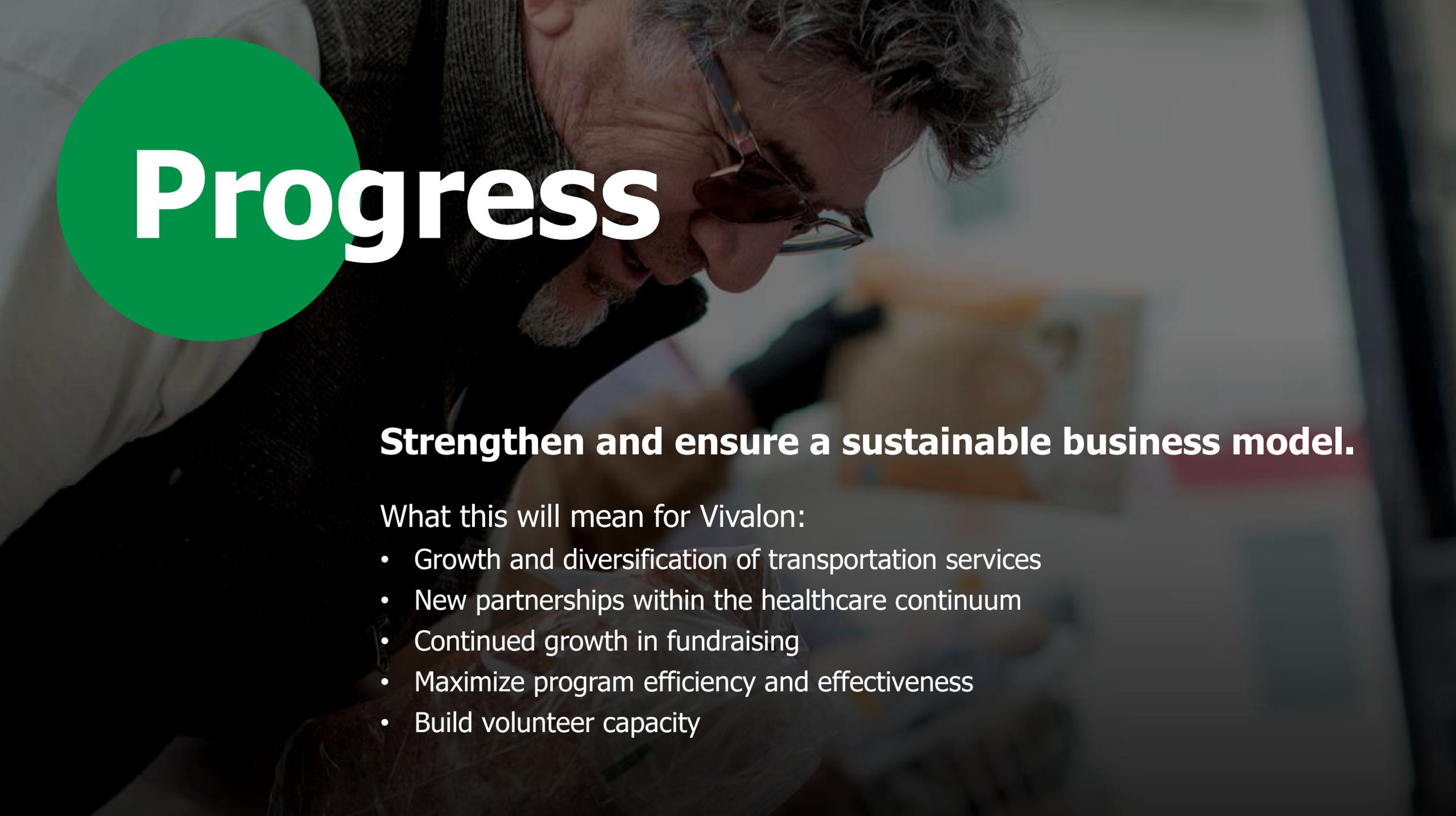
A woman with short, curly purple hair and a red sweater is speaking at a community event. She is gesturing with her hands. In the background, other people are visible, including a man in a blue shirt and another man in a dark jacket. A large teal circle is overlaid on the right side of the image, containing the word "Purpose" in white text.

Purpose

Successfully build and open Vivalon's Healthy Aging Campus by 2024.

What this will mean for Vivalon:

- Ongoing assessment of human capital needs and investment in staff development
- Develop Healthy Aging Campus programs and facilities revenue streams
- New facilities for administration, transportation, and Vivalon's nutrition programs
- Successful completion of capital campaign – Phase 2



Progress

Strengthen and ensure a sustainable business model.

What this will mean for Vivalon:

- Growth and diversification of transportation services
- New partnerships within the healthcare continuum
- Continued growth in fundraising
- Maximize program efficiency and effectiveness
- Build volunteer capacity

Strategic Plan Implementation & Performance Tracking

Vivalon's Executive Team and Board of Directors will track the organization's progress through the execution of annual strategic work plans with specific action steps, deadlines, responsibility assignments, and defined success indicators associated with each goal.

The implementation plans will provide performance metrics for each department, so that all levels of management and staff work to execute the strategic directives. These metrics, designed to be aggressive yet attainable, will be reviewed and updated quarterly by management staff, to track progress and accountability toward the plan's commitment.

However, the plan is flexible to remain realistic and relevant amidst an ever-changing political, environmental, and financial climate.

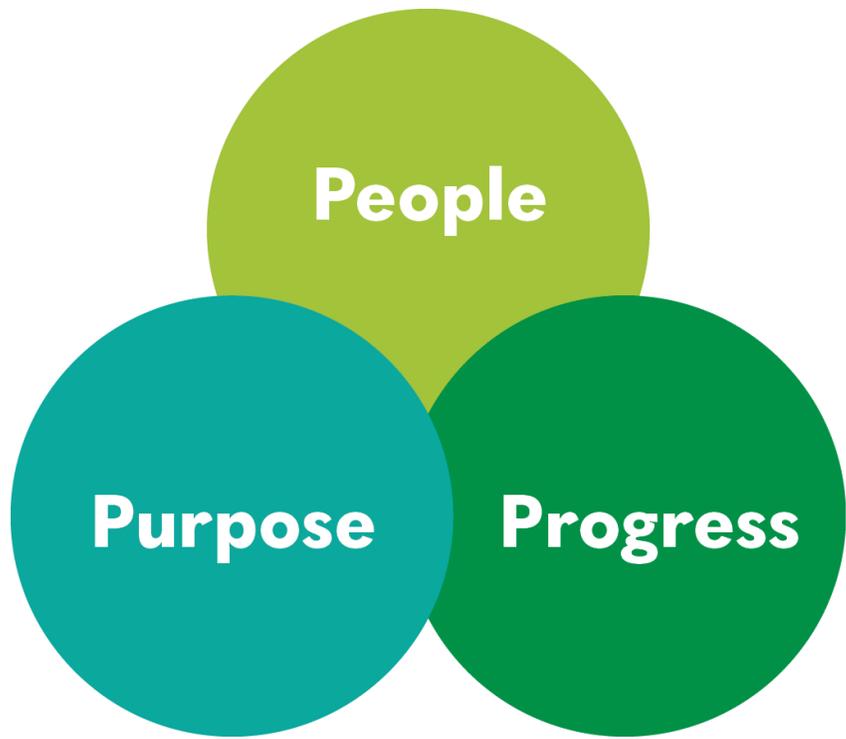
Board Commitment to Execution of the Plan

Vivalon's Board of Directors are a dedicated and committed group of mission-driven professionals who together with staff are a driving force in support of older adults and people with disabilities.

Each member has experience that allows them to contribute expertise to the organization and attract other diverse, well-qualified, high-performing board members to act as ambassadors for Vivalon as the organization rises to meet the growing need for programs and services.

They will also steward Vivalon in its social enterprise business expansion and fundraising efforts, supporting the organization's long-term sustainability.





Community Collaboration

The integrated nature of the three initiatives in the areas of People, Purpose, and Progress will require **increased collaboration, communication** and **problem-solving** across all departments, programs, and staff. With a shared vision and focus, we will draw on each person's unique expertise and contributions.

We are excited to move into this next phase with the opening of Vivalon's Healthy Aging Campus, an expansion and diversification of those we serve, and a heightened passion for our mission to advance independence, health, and quality of life for older adults and people with disabilities for many decades to come.



Vivalon

FORMERLY KNOWN AS WHISTLESTOP
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Vivalon is a registered 501(c)(3) nonprofit organization. Tax ID 94-1422463

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BEST NONPROFIT
ORGANIZATION IN MARIN



BEST SOCIAL
ORGANIZATION

PacificSun
**Best
of Marin
2021**
BEST SENIOR
SERVICES



Platinum
Transparency
2022

Candid.

