




Project Management tracking tool for use by Aging Together Board.

Goals and Strategies from the Strategic Plan

UPDATED AUGUST 2023

AGING TOGETHER 2023 - 2026 MASTER WORKPLAN

 On schedule

 Attention Needed

 Behind Schedule

 Complete

Status Legend

Aging Together Master Work Plan 2023-2026

PURPLE = PROGRAM PLANNING ADVOCACY


GREEN = ADVANCEMENT

BLUE = GOVERNANCE


ORANGE – EXECUTIVE


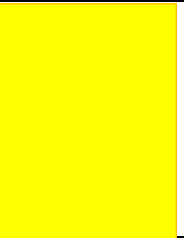
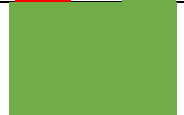


Goal 1: SUPPORT HEALTH, SAFETY AND QUALITY OF LIFE FOR OLDER ADULTS AND THEIR FAMILIES

Strategy 1.1: Support age friendly communities throughout the region through the gathering of information on existing models.


Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.1.1. Explore county-focused initiatives and collaborations to promote aging in place	On-going	Executive Director / PPA	Exploring area-focused initiatives such as Social Isolation task force or home care companion; explore home visitation with Reformation Lutheran and Culpeper Baptist	

Strategy 1.2: Serve as a catalyst to strengthen community-based supports that enhance choice and quality of life for older adults and care givers



Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.2.1 Engage partners in Aging Together Regional Coalition	Ongoing	Executive Director	Attendance varies from 12 – 25 with good feedback on presentations	

Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.2.2 Collaborate with community partners	Ongoing	Executive Director	Expanded partnership with RTC; Alzheimer's Association; local churches	
Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.2.3 Explore the need for comprehensive retirement planning to include emotional, psycho-social, spiritual, etc. and preparedness. Explore best practice models that might be applicable for our region	Jan – Dec. 2023	Executive Director / PPA	Learning about the “Ready or Not” program being used by Rapp at Home as model	
Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.2.4 Facilitate Senior Services Collaborative through PATH	Ongoing	Executive Director	Updated 3-year strategic plan with PATH; narrow focus; look to replicate successful initiatives	
Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.2.5 – Continue to monitor and participate as resources allow in county groups that are taking the lead on addressing access to food; transportation; housing.	Ongoing	Executive Director / PPA	ED attending Madison United; PACH; and collaborating with RTC	
Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.2.6 Partner with the RTC to provide platform for transportation discussions with teams and identified stakeholders	Ongoing	Executive Director / PPA	Community Resource Specialist liaison between RTC and teams	



Strategy 1.3: Explore workforce development issues and strategies for support



Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.3.1 Gather information and develop strategies on workforce issues in LTC and homecare				

Strategy 1.4: Raise awareness of dementia

Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.4.1 Roll out Dementia Friends throughout the region	Quarterly	Executive Director	Quarterly sessions offered. 15 – 25 attendees	
1.4.2 Collaborate with Piedmont Dementia Education Group and other groups for raising awareness about dementia	On-going	Executive Director	Annual Dementia Ed. Conference Dementia Friendly restaurants and Businesses – 34 trained to date for pilot in Culpeper. Will soon roll out to other counties	


Strategy 1.5: Connect older adults and caregivers to needed resources and information – including informational programs

Action Step	Time Frame	Responsible committee/person	Status Update	Status
1.5.1. Update and distribute Regional Resource Directory for older adults every – other year	March	Outreach Director / Executive Director	New editions supported by PATH and NPCF	
1.5.2 Provide Educational programs to older adults and caregivers	Quarterly or Monthly	Executive Director / County Resource Specialist	Monthly educational webinars offered in partnership with AARP	


1.5.3 Address social isolation	Ongoing	Executive Director / SCC	Social Isolation Task Force – RRCS rural mobile outreach collaboration;	
1.5.4 Address capacity and need of each county for Art of Aging Expo on annual basis and determine role of AT for each	Ongoing	Executive Director / PPA		

Goal 2: PROMOTE THE VALUE THAT OLDER ADULTS BRING TO THE COMMUNITY AND CREATE OPPORTUNITIES FOR FULL ENGAGEMENT WITH ALL AGES

Strategy 2.1: Encourage older adults to participate in County Teams


Action Step	Time Frame	Responsible committee/person	Status Update	Status
2.1.1 Initiate community conversations by developing survey questions that will help to prioritize programs and convene stakeholders.	Jan – July 2023	PPA / ED		

Strategy 2.2: Explore and expand the role of County Teams toward our vision for age-friendly communities

Action Step	Time Frame	Responsible committee/person	Status Update	Status
2.2.1 Develop County Teams			County Resource Specialist working with team leads to develop meaningful and productive team meetings.	

Goal 3: CHAMPION COMMUNITY RESPONSE TO THE CHALLENGES FACING OLDER ADULTS
Master Work Plan 2023 – 2026

Strategy 3.1: Work with advocacy group to address legislative issues related to aging issues

Action Step	Time Frame	Responsible committee/person	Status Update	Status
3.1.1 Collaborate with partners for a coordinated approach to advocacy for public policy issues relating to older adults.			Collaborating with RRCS and State Ombudsman on legislative bullet points for visit to local legislators	

Goal 4: ASSURE SUSTAINABILITY OF AGING TOGETHER AS A VALUED COMMUNITY RESOURCE
Master Work Plan 2023 – 2026




Strategy 4.1: AT continue to increase and support partner organizations through AT representation on boards, councils, and on-going meetings

Action Step	Time Frame	Responsible committee/person	Status Update	Status
4.1.1 Participate and monitor meetings and networking opportunities, and outreach to faith communities as appropriate		Executive Director / PPA Committee	Outreach to area churches and key players in each county	



Strategy 4.2: Continue to seek grant funding

Action Step	Time Frame	Responsible committee/person	Status Update	Status
4.2.1. Explore new funding opportunities to expand upon existing government and corporate commitments	On going	Advancement Committee / Outreach Director	Lion’s club, Orange new source; new source, UVA Health for conference	
4.2.2 Make timely and well written funding requests to each of the local municipalities in Aging Together Services area	Winter	Executive Director	2024 requests submitted	
4.2.3. Seek grant from GTE		Executive Director	Received grant funds for 2023	
4.2.4 Seek funds from Culpeper Wellness		Executive Director	Will submit application	
4.2.5 Partnership with RTC	2023	Executive Director	AT hosting 3 staffing positions in partnership with Regional Transportation Collaborative.	




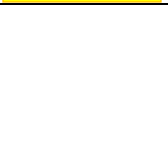
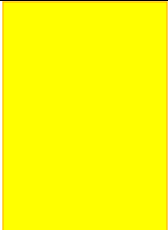
Strategy 4.3: Develop outreach marketing, branding and messaging (moved from GOAL #3)

Action Step	Time Frame	Responsible committee/person	Status Update	Status
4.3.1 Expand CRM to increase functionality as both a record of donors and as a resource for future marketing and outreach	Ongoing	Outreach Direct. /Advancement	Database has increased from 900 with former system (2019), to over 4000 (2022) through program and event registration process.	
4.3.2 Expand and improve website	Ongoing	Outreach Director	Ongoing	
4.3.3 Expand Media connections	Ongoing	Outreach Director / ED	Ongoing	





Strategy 4.4: Promote Positive Aging (added this strategy in to fit into updated master plan)

4.4.1 Promote positive aging / and combating ageism through programs such as Five over Fifty (or similar) that honor the contributions of older of adults	May Event	Executive Committee / PPA	.	
4.4.2 Encourage counties to recognize Older Americans Month each year	Jan - May	PPA / ED	.	



Strategy 4.5: Recruitment strategy for Board of Directors


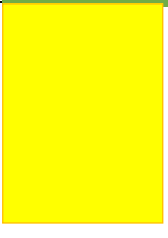
Action Step	Time Frame	Responsible committee/person	Status Update	Status
4.5.1 Using board member matrix and job description, appoint board or ad-hoc committee to begin recruitment		Governance		
4.5.2 Prior to December board meeting GC check in with board members on self-assessment and intent to continue on board.	Sept - Nov	Governance		
4.5.3. Governance committee to ensure skills grid / matrix updated with new board member information at minimum annually		Governance		
4.5.4 Governance will update board member matrix and job description to enable the board to continue with board recruitment	Annually -	Governance		
4.5.6 In collaboration with Executive committee identify appropriate leadership roles for board members and engage in succession planning.		Governance / Executive		

Strategy 4.6: Ensure internal organizational structure supports and strengthens overall organization efficacy

Action Step	Time Frame	Responsible committee/person	Status Update	Status
4.6.1 Review Bylaws & Charter and make recommendations for amendments	Annually	Governance	Annually in advance of June Board meeting	
4.6.2 Review Board Policies included in Board Member / Orientation materials and make recommendations for amendments and/or additions	Annually	Governance	Annually in advance of June Board meeting (minimum)	
4.6.3 Review Committee Charters, revise into consistent format, and make recommendations for changes	Bi-Annually	Governance with support from other committees	Bi-annually at December Board meeting	
4.6.4 Ensure adequate training opportunities are available for Board continuing education	Annually	Governance	Survey distributed to board members to determine preferences	

Strategy 4.7 Develop an annual development plan (campaigns, sponsorships, major gifts, events, etc.) to expand community awareness of Aging Together and identify resource opportunities sufficient to meet service goals

Action Step	Time Frame	Responsible committee/person	Status Update	Status
4.7.1 Initiate draft of development plan that reflects strategic plan priorities provided by the board.	Jan 9	Outreach Director/ Advancement	Working with Advancement committee – in progress	
4.7.2. Quantify resources for current programs at desired levels of service and requirements of any confirmed future initiatives	Jan 2023	Executive Director		

<p>4.7.3 Advancement Committee to provide list to Outreach Director on desired elements of relevant data on current donors and donor history</p>	<p>Jan 2023</p>	<p>Advancement</p>	<p>Currently collected: #s attendees and \$ for each event and funding campaign. #s for donors and dollars of Annual Appeals. Various tagged groups.</p>	
<p>4.7.4 Receive staff summary of current funding streams; identify potential funding streams already known; research additional funding opportunities; and evaluate for compatibility with AT mission / vision</p>		<p>Executive Director/ Outreach Director</p>		
<p>4.7.5 Assess community awareness of Aging Together</p>			<p>Current outreach initiatives include: part time Outreach Assistant * Revamped and Updated Website * Rack Cards * Social Media Campaign * Resource Guide delivery outreach * Weekly article in Culpeper Times * AgeWise Bulletin * Integrated Database * Radio interviews reaching 5 counties * Media partnerships * Health fairs * Art of Aging Expos * 5 Over 50 in each county * Dementia Friendly Initiative * iPads for Seniors * Companion Pets * Representation on PATH Advisory Committee, Culpeper Chamber BOD and Healthy Culpeper * Annual Report *</p>	

			Annual Appeal * Shared outreach partnership with RTC * Annual meeting * Ads in newspapers * partner programs (i.e. Thriving Together 6/22) * PATH volunteer Hub * YouTube Channel and recorded programs * Regional Coalition	
4.7.6 Develop specific action items for priority funding opportunities	April – May 2023			
4.7.7 Present draft Development Plan to board	June 2023			

EXECUTIVE DUTIES AND STRATEGIES:

Assure fiduciary responsibilities are maintained.

Action Step	Time Frame	Responsible committee / person	Status Update	Status
AT Board Chair, treasurer and ED meet to review financials	Monthly	Executive / ED	Montly	

Review Policy and Procedure for updates and recommendations

Action Step	Time Frame	Responsible Committee / person	Status Update	Status
Develop policy and procedure and operational manuals for AT		ED / Governance	In progress – working with board members and advisor to board	

Conduct annual performance assessment of the Executive Director, including review of compensation and benefits

Action Step	Time Frame	Responsible Committee / Person	Status Update	Status
Review annual contract with ED and complete annual performance review with input from all board members and include information provided by any key stakeholders	Annual / June	Executive	IN progress	

Oversee the Annual Budget development, approval and monthly review

Action Step	Time Frame	Responsible Committee / Person	Status Update	Status
Initiate annual budget process	March	Executive / ED	completed	

Plan and Conduct the Annual Meeting

Action Step	Time Frame	Responsible Committee / Person	Status Update	Status
Work with ED to conduct annual meeting	First quarter	Executive / ED	Set for September 14th	

Assure the Strategic Plan is regularly reviewed and updated

Action Step	Time Frame	Responsible Committee / Person	Status Update	Status
Use and update the strategic plan at each Board Meeting. Have committees update their section after bi-monthly sessions	Monthly		Ongoing	