


Project Management tracking tool for use by Aging Together Board.

Goals and Strategies from the Strategic Plan

UPDATED JUNE 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 | Presenters to be secured for balance of year. Review partner and support representation in meetings, boards and councils throughout |  |

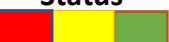
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| | | | the year; consider priorities and make recommendations to board | |
| Action Step | Time Frame | Responsible committee/person | Status Update | Status  |
| 1.2.2 Collaborate with community partners | Ongoing | Executive Director | Contact Board of supervisors members after budget season; reference strategic plan, focus on programming, give copies of Resource Guide | |
| 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 ED presented to NOVA group on social isolation | |
| Action Step | Time Frame | Responsible committee/person | Status Update | Status  |

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| 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

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| 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 | | | Exploring best practices in workforce support in LTC | |

Strategy 1.4: Raise awareness of dementia

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| 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; Dementia Friendly Culpeper trained 10 business to date | |
| 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 | |

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 | AARP Series set for 2023 monthly lunch and learn | |
| 1.5.3 Address social isolation | Ongoing | Executive Director / SCC | Social Isolation Task Force – RRCS rural mobile outreach collaboration; healthy ideas; collaboration with NOVA GROUP | |
| 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 | Looking at possible 2 Expos for this year | |

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 | Community Conversations completed. Collecting data for report. | |

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  |
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| 2.2.1 Develop County Teams | | | Older adult participation in teams is challenging; connect to Silver Seniors and Faith Communities; In person OR Zoom best, hybrid meetings not as successful. | |

**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. | | | Consider V4A budget amendment , Nursing Home staffing standards, Public Guardianship issues, elder abuse, however, local advocacy should be priority | |

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 | Faith communities interested in dementia friendly certification | |

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. Submitted to UVA Community Health. Partnership with RRCS and DARS for social determinants of health initiative | |
| 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- Orange and Culpeper confirmed at current rate; Madison \$2000 (has been \$3000 for several years) | |
| 4.2.3. Seek grant from GTE | | Executive Director | Received grant funds for 2023 | |
| 4.2.4 Seek funds from Culpeper Wellness | | Executive Director | Received Culpeper Wellness Funds | |

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| 4.2.5 Partnership with RTC | 2022 | Executive Director | AT hosting 3 staffing positions in partnership with Regional Transportation Collaborative. | |
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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 | Outreach Director coordinating with UVA Website support | |
| 4.3.3 Expand Media connections | Ongoing | Outreach Director / ED | Ongoing – full page Feb. article in Culpeper Times | |

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

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| 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 | Very successful 5 Over 50 Events with over 300 attendees at 4 watch parties. Debriefing – all key volunteers were invited to provide feedback. Very good discussion and feedback. | |
| 4.4.2 Encourage counties to recognize Older Americans Month each year | Jan - May | PPA / ED | All 5 Counties adopted proclamation –(first time all 5) | |

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 | Add "Board Recruitment" to board agenda |  |
| 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 |
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| 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 | Using DEI training as the model, schedule board or individual training as appropriate – DARS Presentation. Will survey the BOD for ideas. | |

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 | Outreach draft completed; Development plan to be presented by Sept. 2023 | |
| 4.7.2. Quantify resources for current programs at desired levels of service and requirements of any confirmed future initiatives | Jan 2023 | Executive Director | | |
| 4.7.3 Advancement Committee to provide list to Outreach Director on | Jan 2023 | Advancement | Currently collected: #s attendees and \$ for each event and funding | |

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| desired elements of relevant data on current donors and donor history | | | campaign. #s for donors and dollars of Annual Appeals. Various tagged groups. | |
| 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 | | Executive Director/ Outreach Director | ED to submit to Advancement | |
| 4.7.5 Assess community awareness of Aging Together | | | <p>Detailed Outreach Plan presented</p> <p>Current outreach initiatives include:</p> <ul style="list-style-type: none"> 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 * | |

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| | | | 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 | | Consider demonstrating to donors what their dollars support; for example - \$125 buys one “companion pet”, etc. | |
| 4.7.7 Present draft Development Plan to board | June 2023 | | | |

Strategy 4.8. Assure fiduciary responsibilities are maintained

| Action Step | Time Frame | Responsible committee / person | Status Update | Status |
|--|------------|--------------------------------|---------------------------|--------|
| 4.8.1 AT Board Chair, treasurer and ED meet to review financials | Monthly | Executive / ED | Monthly meetings on-going | |

Strategy 4.9: Review Policy and Procedure for updates and recommendations

| Action Step | Time Frame | Responsible Committee / person | Status Update | Status |
|---|------------|--------------------------------|---|--------|
| 4.9.1 Develop policy and procedure and operational manuals for AT | | ED / Governance | Fiscal Policy adopted by the BOD at April 23 meeting. | |

Strategy 4.10: Conduct annual performance assessment of the Executive Director, including review of compensation and benefits

| Action Step | Time Frame | Responsible Committee / Person | Status Update | Status |
|---|---------------|--------------------------------|---------------|--------|
| 4.10.1 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 | | |

Strategy 4.11: Oversee the Annual Budget development, approval and monthly review

| Action Step | Time Frame | Responsible Committee / Person | Status Update | Status |
|---------------------------------------|------------|--------------------------------|---------------|--------|
| 4.11.1 Initiate annual budget process | March | Executive / ED | | |

Strategy 4.12: Plan and Conduct the Annual Meeting

| Action Step | Time Frame | Responsible Committee / Person | Status Update | Status |
|---|---------------|--------------------------------|------------------------|--------|
| 4.12.1 Work with ED to conduct annual meeting | First quarter | Executive / ED | Date set for September | |

Strategy 4.13: Assure the Strategic Plan is regularly reviewed and updated

| Action Step | Time Frame | Responsible Committee / Person | Status Update | Status |
|---|------------|--------------------------------|--|--------|
| 4.13.1 Use and update the strategic plan at each Board Meeting. Have committees | Monthly | | ED to update workplan after each committee meeting | |

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| update their section after bi-monthly sessions | | | | |
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