

# Aging Together

## Strategic Planning Meeting

December 3, 2008

Daniel Technology Center, Culpeper, Virginia

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## INTRODUCTION

The Aging Together partnership organized a day long meeting to discuss its evolution on December 3, 2008. Aging Together's core funding has come from the Robert Wood Johnson Foundation's Community Partnerships for Older Adults program. This funding will end in April 2010. With a four year track record of success and a full slate of opportunities in its future, the Partnership has now begun to ask:

- What kind of work builds on the Partnership's past success and is sustainable in the future?
- What role should the Partnership play moving forward that can complement and not duplicate existing efforts?
- What do members need to continue their support for and involvement with the Partnership?

The following report captures the discussions and issues raised at Aging Together's Strategic Planning meeting, makes recommendations about Aging Together's future, and proposes next steps.

Aging Together members who attended the December 3rd Strategic Planning meeting:

### Partnership Members:

Linda Dietel – Rappahannock Aging Together Team  
Bob Bell - Fauquier Senior Care Network, Fauquier Dept of Social Services  
Michael Soule - Fauquier Senior Care Network, RRCSB/AAA  
Tony Hooper – Fauquier County Administration  
Linda Treakle – Orange County Aging Together Team  
Ray Parks – RRCSB/AAA  
Lola Walker – RRCSB/AAA  
Cathy Zielinski – Rappahannock Rapidan Regional Commission  
Bill Tidball – Madison Aging Together Team  
Sarah Pearson – Fauquier Hospital System  
Toni Browning – Madison Aging Together Team, RRCSB/AAA

### Core Leadership Members:

Sallie Morgan – RRCSB/AAA  
Brian Duncan – RRCSB/AAA  
Jean Kane  
Nan Coppedge – Madison Dept of Social Services  
Jan Selbo – Fauquier Dept of Social Services  
Jack Garber – Piedmont United Way  
Elaine Anderson – Orange County TRIAD

### Aging Together Project Staff

Chris Miller – Project Manager  
Kathi Walker – Executive Assistant  
April Holmes – Communications Coordinator

Jenny Biche – Culpeper County Resource Specialist  
Nancy Rhoades – Orange County Resource Specialist  
Amy Kretz – Rappahannock County Resource Specialist  
Vicki Vance – Fauquier County Resource Specialist

## **RECOMMENDATIONS**

### **RECOMMENDATION #1: Define the Partnership's role post RWJF funding.**

Why is a role important? To sustain a partnership, members must be able to describe the partnership's work and "sell" why doing the work *through* a partnership is critical. For example, Aging Together has done an incredible job and accomplished quite a lot, from caregiver support to housing advocacy to increased transportation services. In order to attract additional and potentially long term support for the partnership, funders need to know what they are being asked to support and why they should support it.

Funders will have to understand how the Partnership is different than other agencies and particularly how the Partnership fits into the overall service network. Without a well defined role, potential funders can quickly confuse the partnership and its members. This can result in the partnership being perceived as a duplication of existing efforts or it can thrust the partnership and its members into competition for the same resources. Confusion on either front would impede everyone's success.

A well defined role not only explains what the partnership does, but it explains the work of the partnership in relationship to others agencies and organizations. This is critical because working in a partnership is not easy to do or describe. Aging Together formed because enough individuals and organizations wanted to find a new way of working, a new way of gathering resources and new ways of solving old entrenched problems. Partnerships are by definition then, always breaking new ground. A concrete, well articulated definition of what the partnership does, how it does it and its relationship to all the other good work that's going on in the community will help not only funders but the broader community to understand and support the partnership in the long term.

The December strategy session included a significant brainstorm on the kind of roles Aging Together might want to pursue. It was clear to all that some combination of roles is most likely to maximize the partnership's strengths while addressing its challenges.

### **RECOMMENDATION #2: Do a quick feasibility study to determine which future roles are financially sustainable.**

- a) Pull together the "passion items" from the role discussion on December 3<sup>rd</sup> that made people excited and see if they can hold together in a cohesive role. The group that met in December was asked to explore the pros and cons of a series of hypothetical roles that the partnership could adopt. After reviewing the pluses and minuses, individuals were then asked to comment on what they felt passionate about. Aging Together should assemble these "passion items" and explore if in fact they could together outline a reasonable future for the partnership. The passion items are important because to make the transition from RWJ funding to full community based

support will take work. There will inevitably be challenges and road blocks. It's important that the group be passionate about the work it is pursuing.

- b) Explore how to restructure or how the focus of Aging Together might need to change to address some of the challenges partners encounter within the partnership. The opportunity to examine the partnership's work and prepare for the future is also the opportunity to discuss challenges. It is important that the partnership continue the conversation about challenging aspects of Aging Together and discuss ways that the partnership can address these issues. Some might be simple ways of reorganizing work and/or communications. Some challenges might be inherent to the partnership process and others might take deeper discussion to get at root causes or effects. But Aging Together does not want to lose this opportunity to learn in all ways from its most recent past and continue the evolution of its work and of Aging Together itself.

It's important to remember that partnerships exist to challenge existing ways of working. Partnerships do not exist to maintain the status quo. If the partnership did not have challenges, it probably wouldn't be doing its job. The opportunity is to find a way to have the tensions and difficulties add to the creative process rather than impede progress.

- c) Arrange for some exploratory conversations with potential funders to see who might be interested in supporting what activities. Aging Together can then funnel this feedback into the development of a role for the partnership.
- d) Study the cons raised in the December meeting more thoroughly. Each of the groups reviewing the different roles was asked to find negative aspects. Now is the time to determine which are insurmountable (deal breakers), which could be overcome with a little work and which could be addressed with a more concerted, longer-term strategy.

**RECOMMENDATION #3: As soon as there is enough of a conceptual role to discuss, vet these ideas with the full partnership.**

Aging Together will either need to form a work group or ask its Core Leadership Group to lead conversations with the rest of the partnership about these potential roles. It will be important to ask the county teams to respond—exploring how they could see the new role playing out, what anxieties it might raise and how they could see Aging Together's future complementing and supporting their own work. Of course if they can't see synergy between Aging Together and their own work moving forward that should be discussed as soon as possible.

**RECOMMENDATION #4: Identify activities that the Partnership can complete in the coming months to better position the Partnership and build its credibility in the areas of future activity.**

While it is so critical to begin sustainability planning now, it's also important to remember that the partnership has 16 months of funding left. Once Aging Together has a clearer idea of where it wants to go and how it wants to change after RWJ funding, it can start to use the time between now and April 2010 to position itself for the next steps. Aging Together should emphasize the work that will build its track record for the future. For example, if Aging Together wants to pursue advocacy as one of its foci moving forward than it should emphasize the parts of its strategic planning that develop its advocacy track record. Aging Together might also need to review its plan to do more in this area and less in another. The bottom line is that there are 16 months of funding to establish Aging Together in whatever way the partnership chooses. Cementing Aging Together's track record to lay a foundation for the future, should be objective #1.

## **BACKGROUND**

Partnerships by definition are about change. Partnerships are not formed to maintain the status quo. Partnerships engage in community assessment and strategic planning not to duplicate or compete with existing programs and services, but to fill gaps, bridge disconnected services, inform and empower older adults. Change is not just the collective work of the partnership it must also be the individual work of partnership members. No member can join a partnership and expect that while everyone else will change, they can keep operating as they always have.

Change is, however, a very hard thing for human beings to do and as a result partnership work is extremely challenging. In assessing the long term future of a partnership, it's important that the partnership has a clear understanding of not only what it wants to do, but why a partnership is an important and necessary means to getting this work done.

To answer the question Why Partnership and then subsequently answer Why Aging Together, the partnership must determine two things:

What is the value we are providing to the community?

What is the value we are providing to our members?

The remainder of this report reviews the information shared at the December strategic planning in relation to these two questions.

In order to imagine its future the Aging Together Partnership must determine both what it will accomplish over the next 2-5 years and whether or not a partnership, and specifically the Aging Together Partnership is the vehicle through which to achieve these goals. The distinction is important because as Aging Together begins to position itself for future financial and community support, it will not only have to make the case for why certain needs must be addressed but why the Partnership is particularly suited to address those needs.

## WHY PARTNERSHIP: Aging Together's Value to the Community Now and in the Future

### **1. DISCUSSION: Aging Together has achieved significant success.**

Aging Together members explored a long list of accomplishments at the December meeting. Even after a lengthy discussion it was clear that much had been left off. Aging Together has demonstrated that it can address some of the most complicated issues facing older adults and the people who care for them by leveraging resources and delivering high quality products and services. Moving forward Aging Together will continue to articulate its accomplishments to its members and to current and potential supporters. (The list of accomplishments, created at the Strategic Planning meeting is in Appendix A of this report.)

### **2. DISCUSSION: Working through a Partnership has made a difference.**

The Partnership then asked, why it was important that the work of Aging Together was accomplished *through* a partnership. In other words, could the same list of accomplishments have been achieved by a single organization or two, if they had been given the appropriate funding? This question is critical, because Aging Together will need to seek support for both its work and its staff. The Community Partnership for Older Adults Program has funded 16 partnerships across the country. In each of these very different environments under varied circumstances, it has been absolutely critical to have staff in order to maintain the partnership. Staff keep the partnership coordinated and focused. They manage and broaden membership. Staff often do the critical follow through between workgroup and committee meetings.

The following list describes why Aging Together felt the work was better, more successful, or in some cases possible at all, because it occurred through a partnership:

- Networking fosters replication
- Models take on the county flavor
- No re-inventing the wheel when things are done through a partnership
- Networking resulted in resources
- Partnership was able to attract local businesses
- Transportation was a big issue, the kind of issue that is hard to tackle alone- Aging Together got it legs, found resources to do training
- Partnership generated the idea, created awareness of the need and directed a solution
- Broader network made the events more successful (e.g. caregiver training)
- Partnership provides fresh energy
- Snowballing effect- once things get rolling in a partnership, they are hard to stop
- Partnership enhanced effectiveness—things happened that would not have happened otherwise because of the partnership

- Broad expertise made work more comprehensive than it would have been if it was carried out by one group
- Power of the group. Group has broader appeal and can bring others to the table
- Partnership lends credibility
- Partnership encourages you to look farther ahead
- Partnership creates collective experience that can be built on over time
- Lends credibility to members
- Partnership maximizes partner contributions, combine things to make all things more effective including personnel and resources
- Partnership can pool staff and other resources
- Relationships built through the partnership foster collaboration
- Partnership provides accountability, the pressure to participate, be responsible to one another
- Umbrella organization can reduce duplication (e.g. resource lists, information)
- Quality across agencies- because members are working together clients can receive higher quality access and information across agencies. All members and as a result their clients are better informed.
- Because of relationships built through the partnership, clients are shepherded through the system rather than just handed off from one agency to the next
- Partnership allows partners to accomplish their own missions more effectively
- Partnership makes me look good to my bosses and board

### 3. DISCUSSION: Finding a role in the future

Aging Together also spent significant time talking about what kind of role it would pursue in the future. To determine a role, you must be able to do two things:

- Explain what you would accomplish in that role, the real, tangible outcomes
- Identify if these activities can provide enough support to sustain the partnership and its work

The group brainstormed about the opportunities and challenges of pursuing different roles. Clearly, Aging Together's future role will not fit into any of the neat boxes described below. Aging Together will likely compose its own hybrid model, one that maximizes its strengths while minimizing its challenges.

The bolded items were the issues or concerns people were most passionate about.

FUNDER	
Opportunities	Challenges
<ul style="list-style-type: none"> <li>• <b>Brings new money in</b></li> <li>• Develop expertise in resource development</li> <li>• Valuable resource to members</li> </ul>	<ul style="list-style-type: none"> <li>• Partnership could compete with itself</li> <li>• Time intensive- requires expertise</li> <li>• Compete with partners</li> </ul>

<ul style="list-style-type: none"> <li>• Pursue new ideas</li> </ul>	<ul style="list-style-type: none"> <li>• Changes member relationships—competition among members</li> </ul>
<p><i>Issues/Concerns: How would the partnership relate to AAA? Could the partnership as funder alleviate increasing demand on other agencies?</i></p>	
<b>CONVENER- ARTICULATOR</b>	
<b>Opportunities</b>	<b>Challenges</b>
<ul style="list-style-type: none"> <li>• <b>Poll resources</b></li> <li>• <b>Share experience and knowledge</b></li> <li>• <b>Think tank on a broad scale</b></li> <li>• <b>Minimize competition</b></li> <li>• <b>Maximize time of the members</b></li> <li>• <b>Reach a broad base</b></li> <li>• <b>Increase visibility and awareness</b></li> <li>• <b>Reduce duplication</b></li> <li>• <b>Empowering</b></li> <li>• <b>Risk shared</b></li> </ul>	<ul style="list-style-type: none"> <li>• Individual ownership of ideas</li> <li>• Philosophy and personalities</li> <li>• Narrow focus</li> <li>• Time commitment</li> <li>• Could lose focus</li> <li>• Possible burnout</li> <li>• Bring new members in</li> <li>• Convener role is not so sexy; might be hard to sell.</li> </ul>
<p><i>Issue/Concern- Convening should be a by product of the other functions.</i></p>	
<b>ADVOCACY</b>	
<b>Opportunities</b>	<b>Challenges</b>
<ul style="list-style-type: none"> <li>• <b>Knowledge base positions AT well</b></li> <li>• Allows Partnership to tackle big issues</li> <li>• <b>Maximize different skills</b></li> <li>• Strong web presence</li> <li>• Advocacy part of change promotion</li> <li>• <b>Allows people to participate in advocacy who might not be able to otherwise</b></li> </ul>	<ul style="list-style-type: none"> <li>• Hard to have 1 voice on any issue</li> <li>• Individual partners have limited time</li> <li>• Competing agendas</li> <li>• <b>Politics</b></li> <li>• <b>Different view points on problems and the solutions</b></li> <li>• <b>Who is going to do the work?</b></li> </ul>
<p><i>Issues/Concerns: Who would fund advocacy? Individuals and/or organizations join? Long haul makes results hard to measure, keep momentum.</i></p> <p><i>Potential Partners: AARP, VA Interfaith group, VA Organizing Project, Interfaith Councils, Elected Officials</i></p>	
<b>SERVICE PROVIDER (Locally based community service provider)</b>	
<b>Opportunities</b>	<b>Challenges</b>
<ul style="list-style-type: none"> <li>• <b>Breed support</b></li> <li>• Fill gap no one is filling</li> <li>• Teams have a clear role</li> <li>• <b>Clear demonstration of success</b></li> <li>• One time events/services</li> <li>• <b>Could tackle important issues like: transportation, home repair,</b></li> </ul>	<ul style="list-style-type: none"> <li>• Have to sustain services</li> <li>• Don't have legal structure for liability etc; might need separate 501(c)3</li> <li>• Staff</li> <li>• Risk of failure</li> <li>• Direct attention</li> </ul>

handymen, isolated seniors	<ul style="list-style-type: none"> <li>• competition with other providers including those who are members</li> </ul>
<p><i>Issues/Concerns-</i> Could maybe <b>Organize service delivery, Would need to Clarify perimeters</b>  Would be hard for partnership to do other things</p>	
<b>INCUBATOR/TECHNICAL ASSISTANCE</b>	
Opportunities	Challenges
<ul style="list-style-type: none"> <li>• <b>Become recognized as an expert on aging issues</b></li> <li>• Counties with planners could utilize</li> <li>• Networks are in place</li> <li>• Education shapes demand &amp; competition</li> <li>• AT is already emerging as a resource</li> <li>• Chamber could be a partner</li> <li>• DSS is already considered an expert</li> </ul>	<ul style="list-style-type: none"> <li>• If a community did not have a planner or planning department, it's unclear who might use this resource</li> </ul>
<p><i>Issues/Concerns: Would people pay?, Who would be the expert?, Advocacy and TA have a link</i></p>	

## **WHY PARTNERSHIP: Partnerships Value to its Partners**

### **1. DISCUSSION: Why did you Join Aging Together?**

Every member present at the retreat was asked to share why they joined Aging Together. Aging Together can't move forward without being well grounded in the reasons for its existence, even if those reasons have changed. Many people also shared that the reason they joined the partnership is still the same reason they continue to participate. Answers that were very similar to another answer have been noted with a number in parentheses.

- Wanted a fuller picture of services in the community
- To find ways to better coordinate resources
- Concerned about the increasing number of older adults (2)
- Concerned about the specific challenges of aging in a rural community
- Curious about what we could achieve through economies of scale
- Data and information to build the case for action on issues facing older adults
- Better understand the needs of older adults in the community.
- Potential for unified leadership and one voice on aging to address the unmet needs
- To find clear action steps in the face of overwhelming change
- Partnership seemed like a good place, able to sustain its work through
- Partnership could foster creative ideas, transcend rules and regulations
- Opportunity to increase energy level, maximize momentum that can be achieved through partnership and working together.
- Share the risk of trying new things

### **2. DISCUSSION: What do I need to get out of the partnership**

Aging Together, because it's a partnership must provide value added to the community and value added to its members. Understanding what its partners value in the work of Aging Together is just as essential to exploring what future activities can receive funding and support. The partnership will only ever be as strong as its members. While people join partnerships for all different reasons, it is important that they receive a real, tangible benefit from the partnership in order to continue participating and very concretely to explain to their boss or their board why they are allocating resources and time to the work of the partnership. If the partners can not find value in the partnership, then no amount of funding will be able to sustain Aging Together.

Aging Together partners shared a wide range of responses to the question, what do I get out of the partnership. As Aging Together charts its future it's critical that it develop a strategic plan and define its role so that partners continue getting the benefits they need and expect. Feedback has been categorized by topic.

- 1) Learn New Information/Gain New Skills:

Stay ahead of the curve on aging in America

New knowledge, personal and professional growth

More knowledge about what's available and what's needed

Opportunity personal growth

Knowledge of great resources to help support my patients in the LTC setting and when discharged to the community

Increased awareness of resources available for my clients, family and friends

Enhance professional knowledge, learn about trends and additional resources

Prepare myself and seniors for growing and changing population; get educated on the issues

Aging Together helps me network in the community

Broadening my own knowledge and understanding of issues in the community

2) Empowered by work with a community partnership

3) Support from Colleagues :

Working with others who care about the same things

Like working as part of a team

4) Having real impact:

Inspiration from the stories of seniors

Sense of accomplishment that my work is having an impact

Improve quality of life of seniors in Orange County

Get self gratification out of making a real difference for seniors

Support members and create support for seniors

Results matter ownership doesn't

Satisfaction when Aging Together projects are successful

Aging Together makes a difference in people's lives

5) Understand Community Needs:

Opportunity to document needs and services

Get comprehensive view of the needs and the services

6) Creativity and Inspiration:

Broader pool of ideas, new models to learn

Broaden experiences and ideas and connections

7) Maximize Resources:

Maximize existing resources by working together

Maximize resources and articulate how Aging Together does that

Ability to achieve more (which matters to my board) with fewer resources

8) Increased Credibility

My own and my agency's credibility is enhanced through our participation in the partnership

9) Partnership becomes a way of working

Partnership creates other partnerships in other areas

10) Enhances my work performance

11) Supports my agency's mission

### **3. DISCUSSION: What are the challenges of participating in and sustaining a partnership?**

Partnerships are hard work. Working in partnership is a new way of working and new things bring both the positive and negative with them. While most of the strategic planning session was spent reviewing the opportunities ahead, the group took some time to talk about what are the challenges and tensions that go along with the work of Aging Together. Responses included:

- Share the credit—in practical terms. Each organization has to justify its time and resources allocated to Aging Together and each organization needs to receive credit for these contributions. However, in practical terms, this can be very difficult. It can lead to misunderstandings and make it difficult for some partners to participate if their work is not recognized both internally and externally.
- Competition for resources- every member has to seek out its own funding. There are times when Aging Together can be perceived as competing for the same scarce funds.
- Obligation to own program- each member has an obligation first and foremost to their own organization. It can be hard to balance these obligations with participation in the partnership.
- Stepping on toes- in breaking new ground, the partnership can sometimes step on toes.
- Partnerships are fragile- while partnerships have incredible momentum and energy, it can often seem like one or a series of changes can quickly counteract months of work.
- Partnerships are hard to explain- because they are out of the box, partnerships don't fit well in other people's boxes. Therefore, they can be hard to explain and for many remain ambiguous and hard to fully support.
- Communication is hard, but important- the partnership has many people and many moving parts. It is hard to keep these all in sync at any given time.

- Turnover in members and staff is difficult- turnover can often leave workgroups and county teams to start all over.
- Autonomy versus collaboration- individuals, workgroups and teams should be finding their own way to address critical challenges. There is no one size fits all. However, there also must be a certain amount of collaboration to insure that things are adding up and that the different groups can build from and learn on one another. This balance between autonomy and collaboration is hard to find.
- County teams vs. AT core leadership- this again speaks to the issue of balance, roles and who calls the shots.
- Continuity of leadership- continuity at all levels is critical, but very difficult to maintain in a volunteer organization.
- Competition of members' time- as a volunteer partnership, it can be difficult for Aging Together to be a constant priority in the midst of so many different things that are going on.

## **CONCLUSION**

Aging Together has a rich and vibrant history. It has already accomplished so much. The December 3<sup>rd</sup> Planning Meeting demonstrated that many of the partners find real value in the work and that many individual lives have been positively impacted by the programs and initiatives.

It is impossible to look ahead and ignore the difficult times our entire nation finds itself in. No doubt this challenging economy makes raising funds harder than it was even 2 or 3 years ago. But some of the basic facts remain:

- The growing older adult population can not be served based on the old models of care
- There are not enough resources to continue working in a fragmented disconnected system
- Partnership has proven to be an effective way to creatively leverage new resources, skills, expertise and better serve older adults and the people who care for them

While things are tight everywhere, now is also the time to invest in a new way of doing business. Aging Together has been and can continue to be a leader for change.

## APPENDIX A: Aging Together Pre-Meeting Interview Summary

*In preparation for the Aging Together Strategic Planning Meeting, 11 key members of the Partnership were interviewed. Each individual was asked several questions about their experiences with Aging Together and their perspective on the future of the Aging Together Partnership. Specifically they were asked to speak about the partnership's accomplishments of which they are most proud of, their vision for Aging Together's future and potential barriers that lie ahead.*

*The following summarizes the comments shared during these interviews.*

### I. Key Accomplishments of Aging Together:

*While the specific responses varied, almost all interviewees said that their accomplishment of which they were most proud was the interagency collaboration that is the cornerstone of Aging Together. Some of the specific events and programs mentioned were similar to those cited at the Strategic Planning meeting:*

- Caregiver Training
- Adult Day Care Center
- Transportation services
- High school training
- Friendly caller program
- Just getting DSS directors to meet and work together
- Senior Prom
- Provide a forum for sharing information and vetting ideas. This improves all services and all agencies
- Community Conversations
- Resource Guides
- Newspaper articles
- Information sharing

### II. Vision for the future:

*While interviewees had different specific ideas about the future of the partnership, several key themes emerged:*

- a. Aging Together should continue to coordinate agencies and foster collaboration to enhance service delivery*
- b. Aging Together should not lose the momentum that has brought a diverse region together*
- c. Aging Together may need to consider getting involved in direct services to fund its efforts.*

*Selected comments about Aging Together's future included:*

- "The future of Aging Together should continue to emphasize its role in sharing information about services available to the entire community"
- "To keep Aging Together going, might need to pursue more direct services rather than working together to coordinate and augment existing services"; "Partnership has not been in business of service delivery, but this is becoming problematic. It is hard to explain what the partnership does and what it plans to accomplish without doing some kind of direct service. Might be important to pursue volunteer coordination or some other service that could benefit the entire region."
- "Aging Together has made us work together despite the size and diversity of our region; we need to build on this collaboration."
- Time to work on more comprehensive systems change
- Collaboration positions us to respond to emerging and changing needs
- Want more seniors to be directly involved in the work of the partnership
- Need to capitalize on momentum—many who weren't big supporters before are supporters now.
- Tackle key issues like volunteer coordination, in home services, in home coordination
- "The future of Aging Together should build on its strength in numbers"

*There were also several concerns about the future of Aging Together.*

- Some interviewees were concerned that the Partnership is not providing enough value and should consider sun setting with the RWJ funding.
- Others said that there should be a re-examination of the structure of the partnership. Specifically that roles need to be clarified and activities streamlined so that participation in the partnership is not as time intensive as it has been in the past. The decision making chain should be clearer and it needs to be easier to bring on new members and get them up to speed.
- Finally several people felt a sense of urgency about the fact that the existing service network is full of gaps and not adequate to meet the needs. These individuals felt that funds and energy should be spent on shoring up existing services rather than branching into new areas or developing new services.

### III. Barriers to the Future of Aging Together

*As would be expected almost everyone expressed concern about money and resources to fund future staff, service and program needs.*

*There were concerns about the logistics and organizational demands of keeping the partnership together.*

- "Simple geography makes it difficult to bring together a region that is this big and this diverse"

- “Our counties need autonomy and the ability to act without getting permission from a central office. At the same time the partnership needs to have a unified voice and message. The diversity and uniqueness of the community makes this balance both important and difficult.”
- “Need to find a way that Aging Together staff provide support to members, and do not add another layer of management. Partners struggle trying to fit partnership work into their other duties. The easier it is to be a partner, the more likely the work will get done”
- “Hard to find the staff and time to get things done between meetings. Need at least the part time county position to help with coordinating and getting the work done.”

*Several people talked about tensions in the partnership:*

- There are challenges making sure everyone gets the credit they deserve
- It is difficult to distribute resources across so many organizations particularly in an environment in which fundraising has become so difficult.
- Several people thought that partners need to take a different perspective on the partnership. Partners should try to find what they are giving to the partnership and not necessarily focusing all the time on what they are getting from the partnership.
- Too often the partnership is understood as just the staff of Aging Together, not the sum of the membership.
- Some partners are “rebellious” against the leadership and structure. This was described as more likely a natural part of the partnership’s evolution and not a major fundamental problem.
- “Need to find a productive role for self-interests—little bit of who is getting what that gets in the way”

*There are challenges external to the partnership which nonetheless affect partnership work:*

- Aging is not enough of a community priority—there is a great emphasis on children and not on the elderly.
- Need to get more seniors directly involved.
- Seniors in this community have so many unmet needs, it is hard to continue to emphasize the benefit of coordination and collaboration when simple needs are not being addressed.

#### IV. Immediate Next Steps:

*When asked how Aging Together should prioritize its activities over the coming months, partners expressed a need for a clear and immediate plan that would define actions and roles over the coming weeks and months. There is a strong desire to get buy-in from all or a majority of partners so that this action plan is supported. Specific suggestions included:*

- Need a clear future plan that everyone can buy into.

- Need to get everyone on the same page
- Need to talk about how we handle money—this seems to be an ongoing source of tension
- Need to continue to get things done, too many meetings will burn people out.
- County teams should focus on becoming self-sufficient
- Need to develop and communicate a plan
- Might need to streamline and slim down operations—support just the essentials

## APPENDIX B: Other Strategic Planning Meetings Notes

### Aging Together Accomplishments to date:

1. Work Plan detailing resources, staffing, ideas, how to get things done
2. Day Break Adult Day Center
3. VolTran
4. Regular newspaper articles
5. Community conversations
6. Caregiver trainings
7. Branding which has increased awareness
8. Affordable housing advocacy—though it didn't achieve its goals, a 24 unit housing complex was built in the area; many more people know about the housing needs of older adults
9. Aging Together message has impacted the state's thinking on housing and long term care
10. Two counties have integrated aging into their comprehensive plan
11. Public Awareness has created new champions at the state and local level
12. Partnership brings strength and credibility to other grant applications
13. Partnership brings together businesses and other volunteers
14. Elder Law project has brought legal community to the table that wasn't there before
15. Elder friendly service stations
16. CarFit- fitting seniors to their cars
17. Medication assistance that serves the region and has provided \$800,000 of medication to 316 individuals
18. Regional Human Services Transportation partnership
19. Partnership breeds partnerships
20. Medical Identification program
21. Bigger impact from working together
22. Volunteer Awareness and recruitment
23. Caregiver Awareness
24. Support for Scrabble School restoration
25. Aging Together has supported members' grant applications
26. Healthcare workforce training
27. Caregiver Awards