


Project Management tracking tool for use by Aging Together Board.

Goals and Strategies from the Strategic Plan

UPDATED Feb. 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 6 - 26 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 ED presented to NOVA group on social isolation	
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	
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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			Exploring best practices in workforce support in LTC	

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 Roll out new initiative Dementia Friendly restaurants in Culpeper.	

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 3 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	All dates set now for Feb – April Conversations.	


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.	
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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	Newly formed collaborations with Wayland Blueridge Baptist Assoc.	

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. Will explore REC grant.	
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. ED presenting to Madison and Culpeper BOS; had one meeting with Madison BOD	
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	2022	Executive Director	AT hosting 2 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	Meeting with Website Consultants from UVA	
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)

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	.All applications in, most sites set for watch parties	
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	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
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	

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	Draft Plan presented to Advancement Committee in Jan.	
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>ED to submit to Advancement</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			

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		

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	In process	

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 update their section after bi-monthly sessions	Monthly		ED to update workplan after each committee meeting	