


Project Management tracking tool for use by Aging Together Board.

Goals and Strategies from the Strategic Plan

UPDATED NOVEMBER 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**



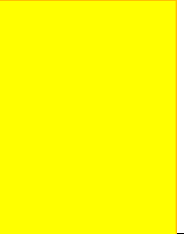






**Goal 1: SUPPORT HEALTH, SAFETY AND QUALITY OF LIFE FOR OLDER ADULTS AND THEIR FAMILIES**

**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 CLAC	

**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	
<b>Action Step</b>	<b>Time Frame</b>	<b>Responsible committee/person</b>	<b>Status Update</b>	<b>Status</b> 
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	
<b>Action Step</b>	<b>Time Frame</b>	<b>Responsible committee/person</b>	<b>Status Update</b>	<b>Status</b> 
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	
<b>Action Step</b>	<b>Time Frame</b>	<b>Responsible committee/person</b>	<b>Status Update</b>	<b>Status</b> 
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	attending Madison United; PACH; and collaborating with RTC; Working on housing supports through the Senior Services collaborative	
<b>Action Step</b>	<b>Time Frame</b>	<b>Responsible committee/person</b>	<b>Status Update</b>	<b>Status</b> 
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 with 10-20 per session	
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 – 50 trained to date for pilot in Culpeper. Fauquier launched, Madison and Rapp. And Orange to follow	


**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 confirmed for 2024	


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	2 Expos offered this Fall in Culpeper and Rappahannock	

**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**

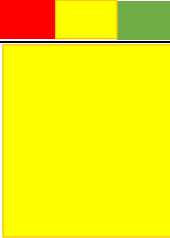
Action Step	Time Frame	Responsible committee/person	Status Update	Status
2.1.1 Initiate community conversations by developing survey questions that will help to prioritize programs and convene stakeholders.	Jan – July 2023	PPA / ED	Community Conversations complete; results being compiled	

**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**

<b>Action Step</b>	<b>Time Frame</b>	<b>Responsible committee/person</b>	<b>Status Update</b>	<b>Status</b>
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**

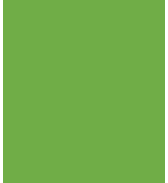


**Strategy 4.1: AT continue to increase and support partner organizations through AT representation on boards, councils, and on-going meetings**

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; beginning to work on 2025 requests	
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)**





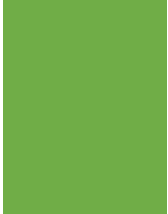
Action Step	Time Frame	Responsible committee/person	Status Update	Status
4.3.1 Expand CRM to increase functionality as both a record of donors and as a resource for future marketing and outreach	Ongoing	Outreach Direct. /Advancement	Database has increased from 900 with former system (2019), to over 4000 (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 <b>Five over Fifty (or similar)</b> that honor the contributions of older of adults	May Event	Executive Committee / PPA	.AgeWise Bulletin and social media focusing on positive aging and activities related to positive aging.	
4.4.2 Encourage counties to recognize Older Americans Month each year	Jan - May	PPA / ED	.Due to our efforts, all 5 counties recognized the proclamation this past May for the first time ever!!	



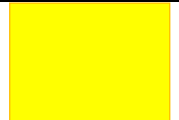
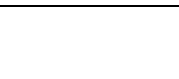
**Strategy 4.5: Recruitment strategy for Board of Directors**

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	New board members have been recruited; total # on board now is 13. Another new member to start after Jan. 24	
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	Discussed at Governance Committee meeting	
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; topic set for December 2023 board meeting	

**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	Jan 2023	Executive Director		

requirements of any confirmed future initiatives				
4.7.3 Advancement Committee to provide list to Outreach Director on desired elements of relevant data on current donors and donor history	Jan 2023	Advancement	Currently collected: #s attendees and \$ for each event and funding 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		
4.7.5 Assess community awareness of Aging Together			<p><b>Current outreach initiatives include:</b></p> <ul style="list-style-type: none"> <li>part time Outreach Assistant *</li> <li>Revamped and Updated Website</li> <li>* Rack Cards *</li> <li>Social Media Campaign *</li> <li>Resource Guide delivery outreach *</li> <li>Weekly article in Culpeper Times *</li> <li>AgeWise Bulletin *</li> <li>Integrated Database *</li> <li>Radio interviews reaching 5 counties *</li> <li>Media partnerships *</li> <li>Health fairs *</li> <li>Art of Aging Expos</li> <li>* 5 Over 50 in each county * *</li> <li>Dementia Friendly Initiative *</li> <li>iPads for Seniors *</li> <li>Companion Pets *</li> <li>Representation on PATH Advisory Committee, Culpeper</li> </ul>	

			Chamber BOD and Healthy Culpeper * Annual Report * 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		Work in progress	

**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	Monthly	

**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	Complete July 2023 for new fiscal year.	

**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	