



# ◆ AgeGuide 2023-2025 Strategic Plan Executive Summary

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## Introduction

AgeGuide's 3-year strategic plan helps bridge the gap between executing its day-to-day organizational work for older adults and reaching its organizational goals. The AgeGuide 2023 - 2025 Strategic Plan establishes the long-term direction of the organization including its vision, mission, strategies, and actions for the next three years. The plan is the result of input from the Board, Advisory Council, staff, and funded partners.

## Planning Process

The Planning Committee began the process for this strategic plan in 2022 by reviewing previous initiatives. However, due to the unforeseen effects of the pandemic on workplans and results, the committee and board agreed to extend the previous strategic plan until 2023.

David Schreier, of David Schreier and Associates, assisted in facilitating the preparation and development of the 2023-2025 Strategic Plan.



**Staff, board, and partners provided extensive input into the process to set AgeGuide up for success.**

The strategic planning process involved input from a wide range of stakeholders including:

- **Staff**
  - AgeGuide staff contributed to the development of planning assumptions and key focus areas of the organization's work.

- **Planning Committee**
  - Comprised of Board and Advisory Council members who reviewed the framework, proposed priorities and analyzed strengths, weaknesses, opportunities, and threats.
- **Planning Workgroup**
  - AgeGuide Board Chair, Planning Committee Chair, AgeGuide CEO, consultant David Schreier, and key staff further refined activities and strategic priorities.
- **Strategic Plan Retreat**
  - AgeGuide staff, Board and Advisory Council members solidified plan development and understanding of best practices to guide implementation.
- **Strategic Plan Session/Funded Partner Annual Kickoff Meeting**
  - 24+ organizations and 65 attendees explored how their work aligned with AgeGuide's mission and strategic plan priorities for the next three years.

This highly collaborative process helped AgeGuide develop a focused list of strategies, objectives and goals that address the overarching Strategic Pillars listed below:

**Advancing Equity**

**Data Driven Decision Making**

**Building a Stronger Organization**

# Strategic Priorities

## *Strategic Pillar: Advancing Equity*

The Older Americans Act (OAA) has always had diversity, equity, inclusion, and access at its core with a stated commitment to serving those in greatest economic and social need. This pillar will position AgeGuide to build more equitable access to services for people over 60, minorities, older adults with incomes below the poverty level, and those living alone. AgeGuide is committed to reframing its work with a sense of urgency, as we recognize the increasing diversity of our region as well as growing inequities and challenges exacerbated by the pandemic.

### **Strategy:**

#### **Outreach to Targeted Populations**

#### **Objectives**

- Increase outreach efforts to diverse populations
- Establish a Diversity, Equity, Inclusion and Access (DEIA) ad hoc committee to identify service gaps/barriers
- Strengthen collaboration with non-traditional partners

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### **Strategy:**

#### **Ensuring Access to Target Populations**

#### **Objectives**

- Embed DEIA practices into core service delivery
- Expand digital connection through affordable access and education
- Promote equitable access to programs that address Social Determinants of Health

## Strategy:

### Foster Positive Aging Perspectives

## Objectives

- Draw attention to unconscious bias and ageism
- Advance equity by supporting inclusive communities

### ***Strategic Pillar: Data Driven Decision-Making***

AgeGuide uses data and stories to demonstrate the good work of its partners and show its return on investment for public and private dollars spent to support older adults with home and community-based services. This pillar will allow us to improve regional planning and decision-making through even more robust data analysis and application. As we move to including the measurement of outcomes, in addition to outputs, AgeGuide will leverage our funded partner's data and stories to impact service design and delivery as well as funding decisions.

## Strategy:

### Identify and Evaluate Data for Performance Measurement (Internal)

## Objectives

- Improve funded partner performance
- Strengthen client outcomes

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## Strategy:

### Utilize Data to Inform Planning, Service and Policy Decisions

## Objectives

- Analyze data for performance and outcome measurement purposes
- Improve regional planning, service design and delivery
- Impact policy at the federal, state and local levels

### ***Strategic Pillar: Building a Stronger Organization***

This Pillar encompasses several types of growth that AgeGuide will address over the next three years. AgeGuide is building new partnerships to increase capacity to deliver quality programs and help influence the sector. Its publications, social media and regional data will strengthen AgeGuide's credibility with potential new funders. Leadership development at the organizational level will continue to strengthen AgeGuide's ability to meet its mission.

### **Strategy:**

#### **Grow Diversified Revenue to Support AgeGuide's Mission and Vision**

### Objectives

- Grow investment revenue and grant funding
- Increase Veterans Administration funded revenue streams
- Cultivate strategic partnerships to deliver programs that address Social Determinants of Health (SDoH)

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### **Strategy:**

#### **Grow Organizational Leadership Opportunities**



## Objectives

- Strengthen diversity of staff, Board and Advisory Council
- Build leadership opportunities for staff, Board and Advisory Council

### *Measuring Success*

Each Strategic Pillar addresses short- and long-term goals to be completed over the next three years. The plan includes benchmarks to measure progress toward these goals as well as dashboards to chart progress and ensure successful completion of the Strategic Plan.