



2023-2025

Strategic Plan

Adopted December 9, 2022

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AgeGuide Mission, Vision and Values

AgeGuide's Mission

To be a vital resource and advocate for people as we age by providing thoughtful guidance, supportive services, and meaningful connections.

Vision

To enhance the quality of life for people on their aging journey.

Our Core Values

Compassion

Knowledge

Inclusivity

Equity

Collaboration

PLAN OVERVIEW

Strategic Plan Development

AgeGuide Northeastern Illinois was founded on June 13, 1974, to implement the Older Americans Act Amendment of 1973. Our charge is to help shape and sustain a system of services and supports that for over 47 years has helped enable millions of older adults to live more independent, meaningful lives as they age and to maximize their quality of their lives.

Our planning and service area is large and includes the eight collar counties surrounding Cook County. These counties are diverse in terms of their community resources, populations, needs, economic stability and equity, and other factors. Additionally, the population size of older adults in our service area is significant - currently 725,000+ - and is projected to steadily increase in the years ahead.

In early 2018, the Board, Advisory Council and staff at AgeGuide Northeastern Illinois made the decision to create a 3-year strategic plan in addition to its Area Plan. The Strategic Plan established the vision, mission, strategies, and actions for the Organization for 2019 through 2021. In March of 2020, the COVID -19 Pandemic impacted the world and AgeGuide Staff, Board and Advisory Council reviewed Strategic Plan initiatives to determine if and how the pandemic would change the strategic initiatives and goals going forward. Short of a few deferments, and eliminations, the Strategic Plan's integrity and appropriateness remained intact. There were no new initiatives added to the Strategic Plan. However, several initiatives were accelerated with a focus on addressing COVID needs and the opportunities these needs provided.

In October of 2021, the Planning Committee met and were provided an overview of the completed FY2021 Strategic Plan Initiatives. There were a few key activities, such as the launch of the AgeGuide Aging Summit, that had not been completed due to the pandemic. Therefore, the Planning Chairperson, Greg Thompson, proposed and the committee voted to recommend the extension of the current strategic Plan until 2023. This Planning Committee recommendation was presented and unanimously approved at the December 10th Board meeting.

Since the current Strategic Plan proved to have a solid base and many of the Strategic Plan initiatives were still relevant, AgeGuide CEO, Marla Fronczak and the AgeGuide Board Chairperson, Greg Thompson, decided to rehire consultant David Schreier of David Schreier and Associates, to assist with facilitating the preparation and development of the 2023-2025 Strategic Plan. First, key AgeGuide staff met and reviewed the 2019-2022 strategic plan as it proved to be a great starting point for the new plan. Staff determined which strategies had been completed, which had been operationalized or incorporated into AgeGuide's work, which initiatives needed to be revised and extended and what new priorities were needed to address community needs and to strengthen AgeGuide organizationally.

Then, AgeGuide staff created a high-level framework of Strategic Pillars, objectives, and activities by providing extensive input on the proposed strategic plan priorities including examples of how AgeGuide’s work ties to the new priorities. In addition, staff developed a set of planning assumptions that identified key factors that could influence or impact AgeGuide’s planning and implementation of activities. These staff contributions resulted in the recognition of key linkages between pillars and opportunities for collaboration.

Strategic Priorities

Next, the Planning Committee met and reviewed the framework and the proposed priorities and completed scenario planning and a SWOT (strengths, weaknesses, opportunities, and threats) analysis on the proposed priorities. After the Planning Committee meeting, the planning workgroup comprised of AgeGuide Board Chairperson, Greg Thompson, Planning Committee Chairperson, Ken Maurice, AgeGuide CEO, Marla Fronczak, consultant, David Schreier, and key staff met to refine activities which showed examples of initiating Community Partnerships as part of the work being done. In addition, they discussed how many of the activities planned would contribute to AgeGuide’s ability to Influence the Sector. It was evident that the prevalence of key linkages among the pillars, the Community Partnership activities, and the work of Influencing the Sector have been incorporated in the pillar strategies and objectives. When the Planning Workgroup reviewed the accomplishments of the current Strategic Plan, they could see that developing Community Partnerships and Influencing the Sector are rooted in AgeGuide’s work. So, rather than separate Pillars, their strategies, objectives, and activities can and should be embedded into the three remaining Strategic Pillars.

Then, a Strategic Plan retreat was held in September and included AgeGuide staff, Board and Advisory Council members. This highly collaborative process proved crucial to the plan’s development and helped us strengthen our understanding of best practices to guide our organization.

Finally, AgeGuide added a strategic plan session as part of the FY2023 funded partner annual kick-off meeting. Over 24 organizations and 65 attendees learned about AgeGuide’s strategic plan activities and explored how their work and missions aligned. David Schreier facilitated this session and AgeGuide staff compiled the input and work product from the strategic plan activities and exercises from both events to further clarify the 2023 through 2025 Strategic Plan.

Based on all the information that we received from stakeholders at both events, the Strategic Plan Pillars evolved from “Diversity, Equity, Inclusion and Access” to “Advancing Equity”

because the data showed that Equity encompasses and is the cornerstone of being inclusive and ensuring access to services. The pillar of “Outcome Driven Decision-making” became “Data Driven Decision-Making” because AgeGuide is focusing on the data currently collected and how it is being utilized to make informed decisions with a focus on looking ahead to the data we will need to collect based on internal and external demands. And, finally, “Growth Opportunities” became “Building a Stronger Organization” because this pillar is centered on building a stronger organization through growing financial resources and investing in human resources (staff, Board and Advisory Council members).

2023-2025 STRATEGIC PILLARS

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 - Creating Awareness

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

Long-Term Goals

- Utilize DEIA committee to identify service gaps/barriers to access
- Increase community dining sites in targeted areas
- Encourage businesses in our region to support their working caregivers

Short-Term Goals

- Establish and Recruit members for a DEIA Ad Hoc Committee
- Promote caregiver self-identification through T-Care screenings
- Enhance outreach efforts to non-traditional partners

Strategy: Ensuring Access to Target Populations.

Objectives

- Imbed 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

Long-Term Goals

- Increase competencies in funded partners to serve diverse populations
- Expand access to services for target populations (those with greatest social and economic need) in each county

Short-Term Goals

- Enhance funded partner capacity for equitable service delivery
- Offer educational programs for digital literacy through libraries
- Expand core Social Determinants of Health (SDoH) programs

Strategy: Foster Positive Aging Perspectives

Objectives

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

Long-Term Goals

- Break down myths and stereotypes about aging
- Grow dementia- and age-friendly communities

Short-Term Goals

- Influence and promote equity through annual events and publications
- Foster community programs that support social connectedness

Strategic Pillar: DATA DRIVEN DECISION-MAKING

AgeGuide has always used 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 decision-making through even more robust data analysis and application. As we move from counting people served and units of service, to measuring more robust outcomes, we will leverage our funded partner's data and stories. This data will impact service design and delivery as well as funding decisions at the local, state, and federal levels.

Strategy: Identify and Evaluate Data for Performance Measurement (Internal)

Objectives

- Improve funded partner performance
- Strengthen client outcomes

Long-Term Goals

- Integrate data collection systems to streamline reporting
- Create a high performing, robust funded partner service network
- Shift funded partners out of conditional status

Short-Term Goals

- Identify who we are serving
- Identify targeted populations in each county
- Identify outcome data collected and how we can leverage it
- Implement intensive monitoring strategies to improve regional performance

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

Long-Term Goals

- Analyze service utilization and demand to make service design and delivery decisions
- Amplify data-informed advocacy messages to increase OAA funding

Short-Term Goals

- Implement AgeGuide Direct Service outcome surveys
- Analyze needs assessment data to inform regional planning
- Utilize existing funded partner outcome data for advocacy

Strategic Pillar: Building a Stronger Organization

This Pillar encompasses several types of growth that AgeGuide will address over the next several years including, new diversified unrestricted funding sources, expanded community partnerships, innovative programs, and intentional leadership development for staff, BOD (Board of Directors) and Advisory Council.

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 SDOH

Long-Term Goals:

- Recruit additional AAAs (Area Agencies on Aging) to participate in the Hub and Spoke model to deliver VIP (Veterans Independence Program) case management services
- Approach federal and private foundations for grant funds
- Increase revenue from investment strategy
- Grow Business Opportunities with Health Care Entities

Short-Term Goals

- Obtain new Veteran Direct Care Agreements with VA Medical Centers
- Implement an investment strategy to build unrestricted resources
- Engage with grant funding collaboratives and foundations
- Educate HC entities on OAA programs and Caregiver Supports that address SDOH

Strategy: Grow Organizational Leadership Opportunities

Objectives

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

Long-Term Goals

- Formalize succession plans for Board and Leadership Team
- Use DEI lens to develop recruitment strategies for staff, Board and Advisory Council
- Implement a staff professional growth and development plan

Short-Term Goals

- Create succession planning for Board and Advisory Council leadership
- Promote new leadership opportunities Board and Advisory Council
- Design a staff professional growth and development plan

Measuring Success

Each Strategic Pillar addresses short- and long-term goals to be completed over the next three years. AgeGuide staff will determine the appropriate benchmarks to measure progress toward these goals. Based on their input, dashboards will be developed to chart progress over the next three years. These dashboards will be shared regularly with the Planning Committee, the Board of Directors, and the Advisory Council.

Appendix A: Leadership

Board of Directors

Gregory Thompson, Chairperson (Lake)
Earl Ball (McHenry)
Gregory Barry (McHenry)
Bruce Conway (Kankakee)
Ralph Feese (Kane)
Gary Ford (Lake)
Amy Georgakopoulos (Will)
Monica Guilhot-Chartrand (Will)
Lou Ann Johnson (Will)
Jack Kreger (DuPage)
Warren Kronberger (Grundy)
Gregory Lind (Kane)
Andrew Love (DuPage)
Kenneth Maurice (Kane)
Debra Mayconich Baron (Kankakee)
Kathryn Monahan Brooks (Lake)
Kristin Murphy (Will)
Michael Steiner (Lake)
Paula Yensen (McHenry)

Advisory Council

Lance Clemens, Chairperson (Kane)
Jennifer Agne (DuPage)
Lore Baker (Kane)
Holly Blastic (DuPage)
Jennifer Brasfield (Kendall)
Beverly Burge (Will)
Mary Kay Furiasse (DuPage)
Ireatha Jones (Kankakee)
Renee Kroplewski (Will)
Christina Kujak (Lake)
Mary McCann (McHenry)
Sharon McNeil (Will)
Dr. Tania Schwer (Grundy)
Patty Steffens (Kendall)
Andrew Stuckey (McHenry)
Stephanie Tintner (Lake)
Myra Valera (Kane)
RaeAnn VanGundy (Kendall)

Planning Committee

Debra Mayconich Baron

Gregory Barry

Gregory Thompson

Jennifer Agne

Jennifer Brasfield

Katie Monahan-Brooks

Ken Maurice, Chairperson

Lance Clemens

Lou Ann Johnson

Mary McCann

Monica Guilhot-Chartrand

Patty Steffens

Renee Kroplewski

Sharon McNeil

Stephanie Tintner

***Planning Committee Workgroup**

Greg Thompson (AgeGuide Board Chairperson)

Ken Maurice (Planning Committee Chairperson)

Marla Fronczak (AgeGuide CEO)

Leslie Edstrom (AgeGuide Director of Planning, Grants & Program Development)

Gretchen Knowlton (AgeGuide Manager of Planning, Advocacy, & Program Development)

David Schreier (Consultant)

Funded Partner List of Organization Affiliation

American Association of Retired Asians
American Association of Retired Asians NFP
Association for Individual Development
Catholic Charities Archdiocese of Chicago
Catholic Charities- Diocese of Joliet
Coalition of Limited English-Speaking Elderly
Community Nutrition Network and Senior Service Association
DuPage County Community Services
Family Service of Lake County
Grundy County Health Department
Harvard Community Senior Center
Independence Health & Therapy
Kendall County Health Department
Metropolitan Family Services
Morris Area Public Library
Prairie State Legal Services
Riverwalk Adult Services
Salinas Aid Care Center
Senior Services Associates
Senior Services of Will County
United Chinese Americans Illinois
Waukegan Township
White Crane Wellness Center

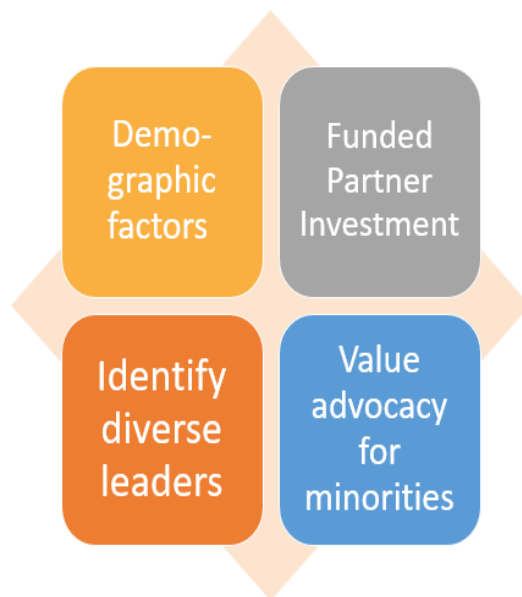
Appendix B: Salient Planning Assumptions

Assumptions & Measuring Success

Salient Planning Assumptions

Advancing Equity

- Demographic factors
- Identify diverse leaders
- Funded partner investment
- Value advocacy for minorities



Most Salient Assumptions:
Advancing Equity

Building a Stronger Organization

- Increases in federal funding
- Legislative advocacy for program growth
- Public awareness/targeted outreach
- Veterans Independence Program
- Strategic partners

Most Salient Assumptions:

Building a Stronger Organization

Increases in
federal funding

Legislative
advocacy for
program growth

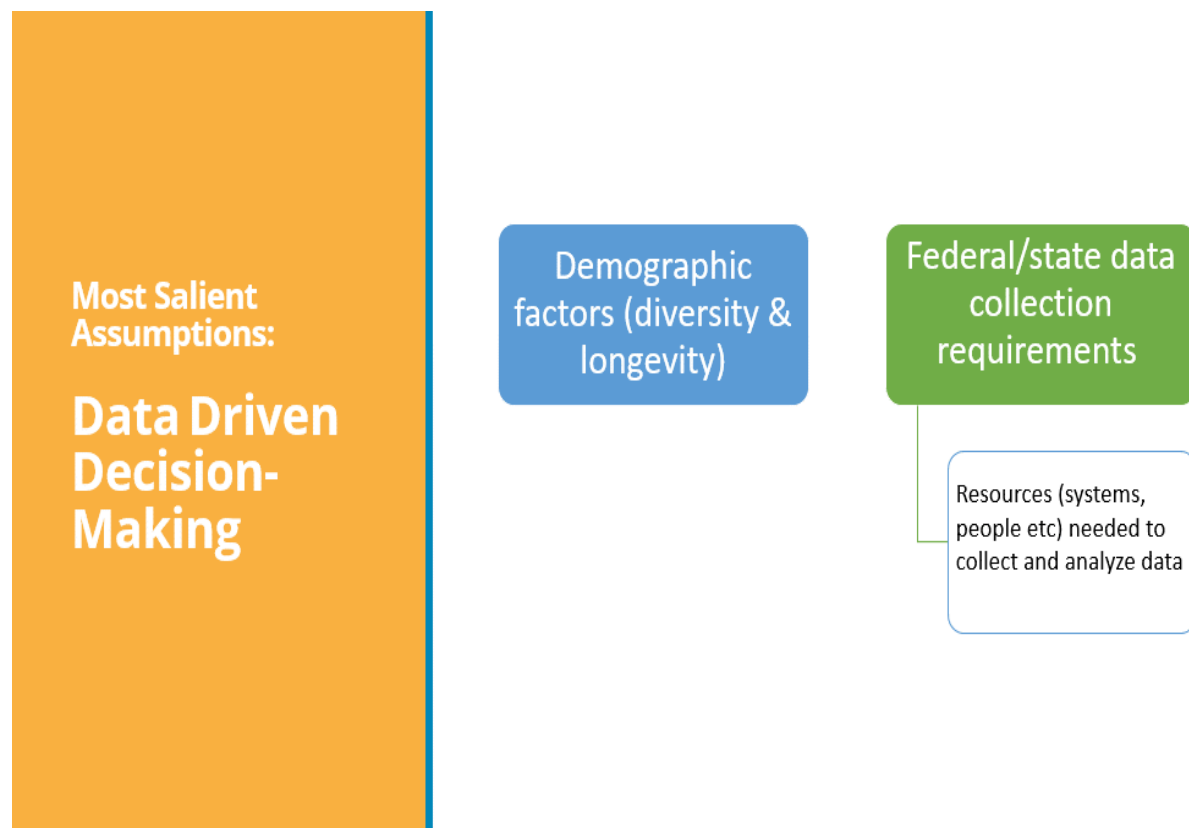
Public awareness/
targeted outreach

VIP program

Strategic
Partners

Data Driven Decision-Making

- Demographic factors
 - Diversity
 - Longevity
- Federal/state data collection requirements
 - **Resources (systems, people, etc.) needed to collect and analyze data**



Measuring Success

Building a Stronger Organization

What should be measured?

- Return on investment
- Grantee performance
- New VA contracts
- Number of participants

Data Driven Decision-Making

What should be measured?

- Accuracy/timeliness of reporting
- Elected officials understanding the program value
- Review outcome data collected
- New participants reached

Advancing Equity

What should be measured?

- Amount of engagement with diverse, underserved communities
- Number of DEI training program participants
- Number of minority adults served
- Number of minority adults who know about our services
- Number of new diverse partnerships (funded & non-funded)
- Number of staff board and advisory who are people of color

Appendix C:

Funded Partner Data

Barriers to Service Expansion

Feedback from funded partners about challenges to service delivery

Staffing Issues

- Education requirements for employees
- Employee mindset
- Staffing shortages
- Minimal training in DEIA
- Lack of competitive wages
- Bilingual staff shortage
- Worker burnout

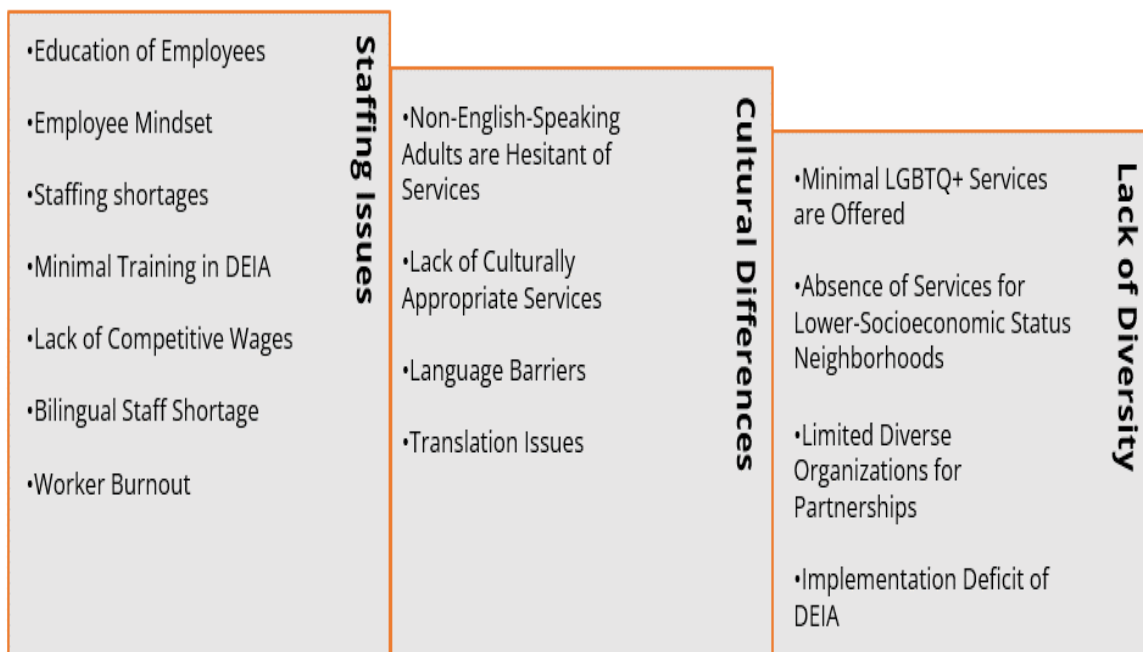
Cultural Differences

- Non-English-speaking adults are hesitant to access services
- Lack of culturally appropriate services
- Language barriers
- Translation barriers

Lack of Diversity

- Minimal LGBTQ+ services are offered
- Absence of services in lower socioeconomic status neighborhoods
- Limited diverse organizations for partnerships
- Implementation deficit of DEIA

Barriers to Service Expansion



FEEDBACK FROM FUNDED PARTNERS ABOUT DIFFICULTIES AND CHALLENGES TO SERVICE DELIVERY.

Barriers to Accessibility

Feedback from funded partners on resources, personnel, and capacity to meet the needs of underserved populations.

Language Barriers

- Difficulties hiring bilingual staff
- Non-English assessments take more time

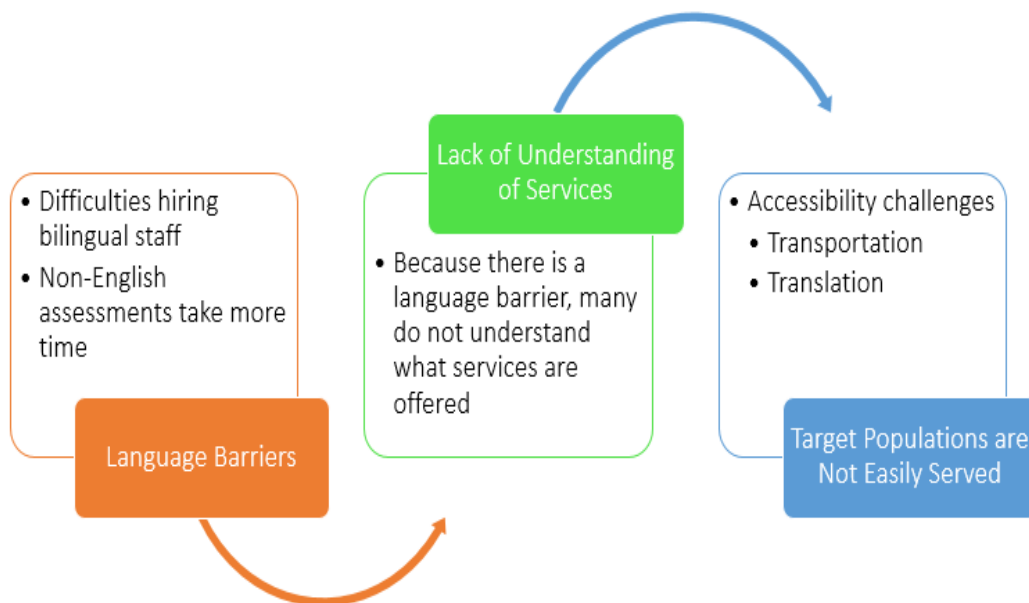
Lack of Understanding of Services

- Because there is a language barrier, many do not understand what services are offered

Target Populations are Not Easily Served

- Accessibility challenges
 - Transportation
 - Translation

Barriers to Accessibility



FEEDBACK FROM FUNDED PARTNERS ON RESOURCES, PERSONNEL, AND CAPACITY TO MEET THE NEEDS OF UNDERSERVED POPULATIONS.

Funded Partner Activities

Funded partner activity around the two pillars of Advancing Equity and Data Driven Decision-making.

Advancing Equity

- Collaborating with agencies as a means of accountability
- DEIA lens for data collection
- Targeted outreach
 - LGBTQ+
 - Immigrants
 - People of color
- Mandatory training
 - Sage training

Data Driven Decision-Making

- Health promotion programming
- Sharing outcome stories and quantifying data
- Analyzing organizational diversity
- Collecting demographic data

Funded Partner Activities

Advancing Equity

- Collaborating with agencies as a means of accountability
- DEIA lens for data collection
- Targeted outreach
 - LGBTQ+
 - Immigrants
 - People of Color
- Mandatory Training
 - Sage Training

Data Driven Decision-Making

- Health promotion programming
- Sharing outcome stories and quantifying data
- Providing transportation
- Analyzing organizational diversity
- Collecting demographic data

FUNDED PARTNER ACTIVITY AROUND THE TWO PILLARS OF ADVANCING EQUITY AND DATA DRIVEN DECISION MAKING

Measurements of Success

How are funded partners measuring their success?

- Quarterly reports
- Participant attendance data
- Identifying red-lined neighborhoods
- Number of individuals maintained at home
- Financial outcomes
- Needs assessment
- Number of diverse partnerships
- Isolation survey data
- Number of people of color served
- Sage certification level
- Client engagement
- Satisfaction surveys

Measurements of Success

Quarterly Reports	Participant Attendance Data	Identifying Red-Lined Neighborhoods	Number of Individuals Maintained at Home
Financial Outcomes	Needs Assessment	Number of Diverse Partnerships	Isolation Survey Data
Number of People of Color Served	Sage Certification Level	Client Engagement	Satisfaction Surveys

HOW ARE FUNDED PARTNERS MEASURING THEIR SUCCESS?

Appendix D:

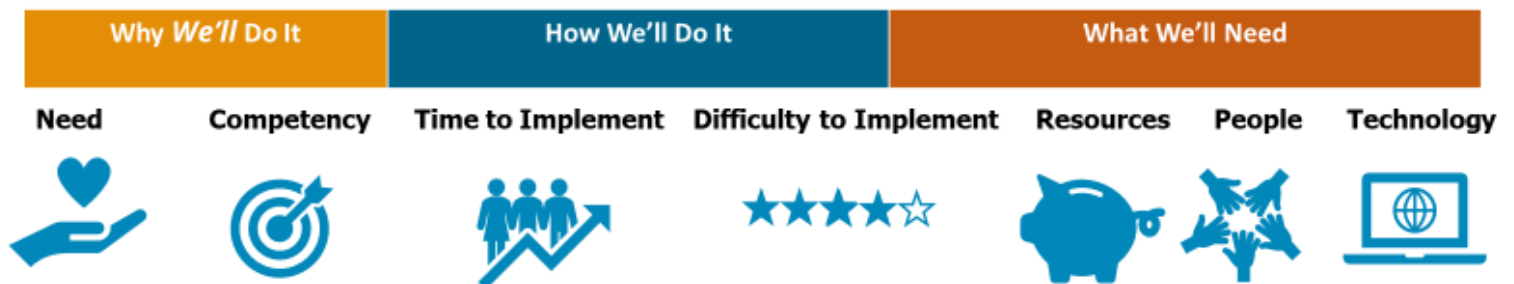
Dashboard

Data

Dashboard for Program Discernment

1. Why We will Do It
2. How We will Do It
3. What We will Need

Dashboard for Program Discernment



Definitions:

Need: How great is the anticipated need? (low to high)

Competency: How competent is AgeGuide in this area? (low to high)

Time to Implement: Length of time required to implement (in years)

Difficulty to Implement: Relative ease or difficulty to implement (low to high)

Financial Resources Needed: Anticipated degree of dollars required (low to high)

People: Anticipated degree of people power required (low to high)

Technology: Anticipated reliance on technology (low to high)

Objectives

Rated on a value scale from 1 to 5

- Need
 - How great is the anticipated need? (low to high)
- Competency
 - How competent is AgeGuide in this area? (low to high)
- Time to Implement
 - Length of time required to implement (in years)
- Difficulty to Implement
 - Relative ease or difficulty to implement (low to high)
- Financial Resources
 - Anticipated degree of dollars required (low to high)
- People
 - Anticipated degree of people power required (low to high)
- Technology
 - Anticipated reliance on technology (low to high)

Timeline:

This is an example of a segment of a much larger spreadsheet that AgeGuide staff will utilize to determine the activities that will be completed to meet each objective and goal. Staff will be going through this and determining the specific activities under each goal and how we will measure our progress on the activities.

AgeGuide 3-year Strategic Plan Timeline

Strategic Pillar	Strategy	Objectives	Long-Term Goals	Short-Term Goals	Activities	Measurement Tool
ADVANCING EQUITY	Foster Positive Aging Perspectives	Draw attention to unconscious	Grow dementia- and age-friendly communities	Foster community programs that support social connectedness	Add 5 new DF and/or AF communities	
					Lifelong learning/education opportunities	
		Advance equity by supporting inclusive communities	Break down myths and negative stereotypes about aging	Influence and promote equity through annual events and publications	Provide Intergenerational programs	
					Social connection through civic	
DATA DRIVEN DECISION-MAKING	Identify and Evaluate Data for Performance Measurement	Optimize client outcomes	Integrate data collection systems to streamline reporting	Identify who we are serving	Aging Summit to address ageism	
					Aging Report & communications	
		Improve funded partner performance	Create a high performing, robust funded partner service network Shift funded partners out of conditional status	Identify underserved populations in each county		
					Identify outcome data collected and how we can leverage it	
	Utilize Data to Inform Planning, Service Design, Delivery and Policy Decisions	Analyze data for performance and outcome measurement purposes		Implement intensive monitoring strategies to improve regional performance	Implement AgeGuide Direct Service outcome surveys	
		Improve regional planning, service design and delivery	Analyze service utilization and consumer demand for service design and delivery decision-making	Analyze needs assessment data to inform regional planning		
		Impact policy at the Federal, state and local levels	Amplify data-informed advocacy messages to increase QAA funding	Utilize existing funded partner outcome data for advocacy	Produce 11 podcasts in year 1, 14 in year 2, 17 in year 3. Grow followers and listens. Produce 2 long-form advocacy videos per year	Podcast statistics Number of videos & number of watches