

AgeGuide's 2023-2025 Strategic Plan Appendix – March 2025

The AgeGuide Board of Directors Executive Committee oversees the Strategic Plan workgroup. It was requested that AgeGuide's Executive Team (ET) review the current strategic plan with the lens of how the new Presidential Administration may impact its three strategic pillars and strategic goals. The team would then revise, and propose new initiatives, if needed, to adjust for any threats or opportunities they uncovered.

On February 12, 2025, the ET presented the results of their SWOT analysis to the Board's Executive Committee and shared their recommendations to modify strategies, goals, and timelines as necessary. The team reviewed the final 2023 and 2024 SP dashboards and the proposed 2025 Strategic Plan goals.

In 2020 we reviewed the 2020-2022 Strategic Plan initiatives considering potential threats and opportunities. At the time, Mr. Thompson explained that as a general practice, we should consider Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis when our environment changes. He further explained that Strengths and Weaknesses typically represent an internal view of the organization, while Opportunities and Threats represent things externally imposed on AgeGuide. Since a change in the Presidential Administration is an external event imposed on AgeGuide, the review of the Strategic Plan focused on Opportunities and Threats that may result.

The Board and staff agree the 2023-2025 Strategic Plan pillars are still valid. However, the prioritization of the strategic plan activities and/or goals might need to be modified or put on hold to make room for higher-priority initiatives in the current environment. The Executive Team was also encouraged to consider if additional initiatives were needed due to the current situation.

Review of Challenges to the Strategic Plan Pillars

The team conducted an environmental scan of the three Strategic pillars and noted some challenges we may face as we complete our 2025 SP goals and activities. Below is a summary of the potential challenges:

- **Advancing Equity Pillar**
 - Executive Order to stop DEI work.
 - Executive Order to no longer service immigrant older adults.
 - Will addressing Ageism be considered DEI work?
 - Will the DEIA Subcommittee activities need to end or change?
- **Data-Driven Decision-Making Pillar**
 - Funded partners continue to provide inconsistent Data reporting.
 - Demographic data collection will be more difficult under DEI Exec. Orders.
 - Need to show the ROI of OAA programs to protect Federal and State funding.
- **Building a Stronger Organization Pillar**

- Fewer Opportunities to Diversify Revenue
- Impact of potential cuts to Federal and/or State Funding
- Inconsistent Cash Flow (Potential Funding freeze, Continuing Resolutions)
- Revenue Deficits (how to supplement with Unrestricted funds)

After we completed an environmental scan of the three strategic plan pillars, the team conducted a SWOT analysis to identify any potential external Threats that could lead to Opportunities. Below is the summary shared with the Executive Committee's Strategic Plan Working Group.

External Opportunities/Threats

- OAA Reauthorization – could identify new revenue sources.
- Federal/State funding Increases/Decreases
- AAAs as a Community Collaborative Hub to design and test Caregiver Initiatives
- Aging Network as a lead for Social Engagement (Health Depts., CDC funding, other)
- Expect more public/private partnerships (Administration wants Businesses to invest)
- Medicare Advantage Plans to pay for home care, transportation (SDOH integration)
- Medicare/Medicaid plans (DSNP) to pay for caregiver support & E-B Falls prevention.
- Elizabeth Dole Act mandated increases in VDC funding nationally to VA Medical Centers
- Hospitals to invest in OAA services (social care)

Internal Strengths/Weaknesses

- Organization structure
 - Internal staffing needs – do we have the right people/positions?
 - Enhanced Data collection for validation of AAA success
- Revenue needed if cuts to Federal/State funds (use of AgeGuide's Unrestricted Funds)
- Diversify Revenue (Forefront to research potential grants and strategic partnerships)
- Identify Area Agencies on Aging Priorities (what to invest in staff time/resources)
 - Access
 - Awareness
 - Housing Advocacy
 - Caregiver Support

Given the current political environment, the team also reviewed recommendations for Policy and External Affairs Opportunities that AgeGuide should consider:

- Federal/State Funding Advocacy (service impact and cost savings)
- Affordable Housing Advocacy
- Working Caregivers
- Ageism/Workforce development
- Transportation

- Access to Nutrition services
- IL Multi-Sector Plan on Aging (MPA) – makes aging a priority for state departments (housing, transportation, workforce, etc.)

2025 Proposed Strategic Plan Goals

The ET shared its proposed 2025 Strategic Plan goals with the committee. The committee supported the ET recommendations and will bring the proposed 2025 Strategic Plan goals to the Board for approval. In conclusion, the committee agreed that the AgeGuide Strategic Plan's integrity and appropriateness should remain intact. There was no recommendation to add any new initiatives to the Strategic Plan. It was encouraging to see that AgeGuide's Strategic Plan is solid and will lead us in the right direction for growth and expansion.

Next Steps for Strategic Planning

The ET asked the Board to consider the following questions to guide us on whether to extend the 2023-2025 Strategic Plan another year or two or to convene a retreat to create a new Strategic Plan for 2026.

- How much does the Board want AgeGuide to go beyond its traditional AAA role?
- What should our diversity, equity, and inclusion efforts include?
- How do we better support our funded partner network?
- How do we create a unified voice for AgeGuide, the network, state?
- What types of partnerships would be valuable for AgeGuide to seek out?
- To better understand the fund development needs of the organization, what additional activities are needed that we are not currently doing? afford?

The committee did not have much time to discuss these questions, and they also suggested the Board weigh in on this guidance. The ET is proposing the Board of Directors convene a Strategic Planning session on Friday, May 9th from 10:30a-12p before the In-Person Board meeting to review the SWOT and these questions to guide us on the next steps for the Strategic Plan.

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