

Better Health • Better Care • Lower Cost



Aging & In-Home Solutions

**2016-2018
Strategic Plan**





Planning Process Overview

Since 1974, CICOA Aging & In-Home Solutions has proudly served as Central Indiana's state-designated Area Agency on Aging, serving Marion, Boone, Hamilton, Hancock, Shelby, Johnson, Morgan, and Hendricks Counties. By linking these Central Indiana communities with a wide range of services for older adults, people with disabilities, and family caregivers, CICOA advances its organizational mission to ***"empower older adults, those of any age with a disability, and family caregivers to achieve the greatest possible independence, dignity, and quality of life."***

From May through August of 2014, CICOA's Board of Directors convened for a series of visioning sessions, during which they refined CICOA's organizational purpose, resulting in the following purpose statement. ***"We are the unbiased experts who provide innovative answers, services, and support your need to help your loved one remain at home in better health, with better care, at a lower cost."***

Given CICOA's commitment to this purpose and to strategically advancing the organization's mission, CICOA engaged the trusted nonprofit consulting firm Hedges & Associates in January 2015 to facilitate the development the organization's 2016-2018 Strategic Plan, which will guide and measure the growth, sustainability, and continued effectiveness of the organization for the next three years.

To ensure that all goals and strategies identified through the organization's planning process were data-driven and informed by community and organizational needs, Hedges & Associates first conducted a comprehensive community-based research process, which included:

- 1) an External Stakeholder Assessment** utilizing a combination of in-depth phone interviews with key stakeholders and ten focus group sessions to collect input from stakeholders from each county within CICOA's service area, as well as the CICOA Advisory Council, and community leaders;
- 2) a comprehensive Internal Organizational Assessment** including an electronic survey to collect input from CICOA's staff and multiple planning sessions with CICOA's Strategic Planning Steering Committee, CEO Orion Bell, and Director of Planning & Quality Assurance Doug May to identify organizational priorities and opportunities; and
- 3) a Comparative Analysis** of other Area Agencies on Aging selected by CICOA (Direction Home, Akron-Canton Area Agency on Aging; Area Agency on Aging for Seattle and King County; and Council on Aging of Southwestern Ohio) to identify potential proven strategies to strengthen the CICOA model.

Drawing on the comprehensive data and emerging themes from this research process, as well as the organizational progress made through the 2013-2015 Strategic Plan, CICOA's Operating Board, Foundation Board, and Advisory Council convened for a results-focused **Strategic Planning Retreat** facilitated by Hedges & Associates in April 2015, during which they worked collaboratively to identify **strategic priorities and goals** to steer organizational growth and sustainability over the next three years.

Building on these board identified priorities and goals, CICOA's departmental staff developed comprehensive **action plans, measurable outcomes, and quarterly metrics** to ensure measured, successful implementation and progress toward the organization's strategic vision over the next three years. The results of this comprehensive, inclusive process are detailed within the following 2016-2018 Strategic Plan.



Mission, Vision, Purpose, and Values

Our Mission

CICOA Aging & In-Home Solutions empowers older adults, those of any age with a disability, and family caregivers to achieve the greatest possible independence, dignity, and quality of life.

Our Vision

A Central Indiana community where older adults and those of any age with a disability flourish

Our Purpose

We are the unbiased experts who provide innovative answers, services, and support you need to help your loved one remain at home in better health, with better care, at a lower cost.

Our Values

Independence

CICOA supports the exercise of individual initiative to make choices and to enjoy life without unnecessary restrictions.

Dignity

CICOA respects the rights of others, is sensitive to differences, and affirms the dignity of all people.

Quality of Life

CICOA strives to enhance people's lives through the promotion of good physical, social, emotional and mental health and participation in the whole community.

Fairness

CICOA provides equality of opportunity and treats all individuals in an impartial manner, without prejudice and free from all special interests.

Collaboration

CICOA believes that partnering with other organizations creates greater opportunity for accomplishments of its mission than by working alone.

Exceptional Service

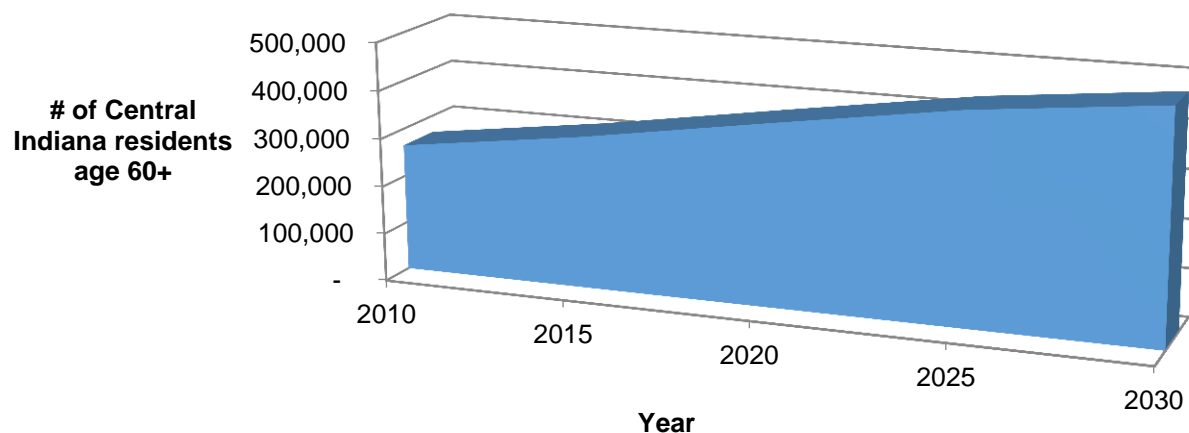
CICOA seeks to exceed its clients' and stakeholders' expectations with the highest quality programs, outreach, activities and communications.



Community Assessment

Anticipated Population Growth

According to the U.S. Census Bureau, in 2010, 15.6% of the 1.7 million people living in CICOA's service area were age 60 and older. By 2030, this percentage of older adults is estimated to increase to 23% of Central Indiana's population, a trend that is consistent with population patterns throughout the United States.



Community Needs

As the aging population grows, community stakeholders who participated in the External and Internal Assessments during the planning process unanimously agree that simultaneously increasing the availability of the following services and supports will be essential to ensure that older adults and people with disabilities at any age can maintain independence, dignity, and quality of life:

- Comprehensive Caregiver Support
- Transportation Services
- Awareness and Accessibility of Resources
- Affordable Housing
- Home Safety
- Access to Fresh, Quality Food
- Access to Home Care
- Mental Health Services
- Support for Adult Protective Services

Community stakeholders throughout CICOA's service area called on CICOA to address these needs through:

- a proactive approach that encourages preventative care,
- increased awareness of CICOA and available services,
- a localized response that focuses on accessibility resources and service delivery within each county of CICOA's service area, and
- increased resources and options for individuals who do not meet income eligibility guidelines for many of the services that are currently made available through CICOA and its network of partner agencies.



2016-2018 Strategic Priorities

To effectively prepare for Central Indiana's anticipated population growth while addressing the demonstrated needs of the population served, CICOA's leadership set forth the following strategic priorities to guide the organization's work from 2016 through 2018:

1. Proactively Strengthen Services

Focus on preventative services, comprehensive caregiver support, and preparing infrastructure to increase services for a growing population at all income levels.

2. Increase Awareness

Focus on promoting current services while encouraging community members to prepare for aging and caregiving to lay the groundwork for future re-branding to introduce more comprehensive programs for a growing population at all income levels.

3. Build Organizational and Community-Based Infrastructure

Focus on strengthening CICOA's internal staffing structure and the network of community-based service providers to continue to meet the growing demand for services.

4. Increase Financial Capacity

Focus on diversifying and increasing revenue streams to continue services for the growing population while financially preparing to increase access to services for individuals at all income levels.



2016-2018 Strategic Goals

To advance each of the organization's strategic priorities, CICOA's leadership established the following priority-specific goals. Supplemental action plans and measurable outcomes for each goal, which were carefully developed by CICOA's departmental staff, are demonstrated in the supplementary 2016-2018 Strategic Plan Scorecard, which will be utilized internally by CICOA throughout the three year plan to ensure measured and successful implementation.

Priority 1: Proactively Strengthen Services

Focus on preventative services, comprehensive caregiver support, and preparing infrastructure to increase services for a growing population at all income levels.

Goals for Priority 1:

- a. Expand coordinated **transportation** options to increase accessibility between counties and service providers, and during extended hours.
- b. Develop a multi-faced, highly engaging and interactive **caregiver program** that includes coaching, skills-based training, increased respite care, crisis planning, and flexible support group options that helps the community to embrace a culture of caregiving for multiple generations.
- c. Continue to support **navigation services** by increasing inter-agency collaboration and focusing on person-centered care supported by NCQA requirements.
- d. **Localize services** throughout CICOA's service area through an increased presence of CICOA personnel in each county and increased access to services and tools outside of Marion County.
- e. Deliver more coordinated, immediate intervention services for **transitioning to homecare** through a multi-channeled approach, including a continuum of options from webinars and navigation options to a "SWAT Team" approach.
- f. Meet or exceed **quality assurance** standards for service delivery in all programs.

Priority 2: Increase Awareness

Focus on promoting current services while encouraging community members to prepare for aging and caregiving to lay the groundwork for future re-branding to introduce more comprehensive programs for a growing population at all income levels.

Goals for Priority 2:

- a. Refine and simplify current messaging and **organizational storytelling** to draw on the vision developed in 2014, clarify what CICOA currently provides for the aging population, and share that CICOA also provides services for people with a disability at any age.

- b. Implement **locally tailored awareness efforts** in all counties within CICOA's service area that support county-specific senior centers and local networks of service providers.
- c. Develop and distribute **simplified toolkits and handbooks** for all community partners to use to help increase awareness of available services.
- d. Implement **prevention-focused awareness efforts** that focus on general aging information, preparing for retirement or loss of resources, sudden caregiving, accessibility issues, health and nutrition information, etc.
- e. Engage in strategic **outreach efforts within the business community**, HR departments, high schools, and colleges to provide interactive caregiver coaching.
- f. **Prioritize marketing to donors** to increase support for existing efforts while laying groundwork for future marketing efforts to the community at-large.
- g. Determine the **key, long-term messages** about CICOA's efforts to address the needs of the growing population at all income levels and their caregivers.

Priority 3: Build Organizational and Community-Based Infrastructure

Focus on strengthening CICOA's internal staffing structure and the network of community-based service providers to continue to meet the growing demand for services.

Goals for Priority 3:

- a. Review **staff structure and training opportunities** to ensure continued provision of high quality services, better manage high call volume and high caseloads, and prepare to accommodate growth in population and programs.
- b. **Support and develop all CICOA staff** by providing more promotional opportunities and distributing decision making within the staff structure to retain top talent and be a top place to work.
- c. Continue management and growth of **volunteer program** to increase organizational capacity and community awareness.
- d. Explore and adopt **new technology and improvements to technological infrastructure** to increase capacity and customer service of ADRC.
 - i. Implement new website sign-up functions for the ADRC.
 - ii. Increase capacity of current phone system.
- e. Focus on the promotion and development of the network of **community-based service providers** that the growing population relies on.
- f. Advocate in support of **community-based expansion of affordable housing** options.

- g. Build and support coordinated, **immediate intervention teams** in the community that include volunteers, service providers, and health care providers to support successful home care transitions.
- h. Explore possibility of **mobile CICOA offices** to provide more community-based, localized services at community centers, centers for working families, Great Places neighborhood sites, and other locations within CICOA's service area.

Priority 4: Increase Financial Capacity

Focus on diversifying and increasing revenue streams to continue services for the growing population while financially preparing to increase access to services for individuals at all income levels.

Goals for Priority 4:

- a. **Explore for-profit business development options** for CICOA while ensuring continued alignment with CICOA's mission in preparation for providing more inclusive services to individuals at all income levels.
 - i. Consider potential partners.
 - ii. Determine interest and regulations within CICOA and the community.
- b. Continue to **pursue contracts with hospitals and insurance providers** to replicate success of Anthem and Eskenazi partnerships.
- c. **Explore private pay options** for individuals at all income levels while ensuring continued alignment with CICOA's mission.
 - i. Determine interest and regulations within CICOA and the community.
 - ii. Develop sliding scale fee policy.
- d. **Reassess allocation of resources** to address all identified strategic priorities.
- e. Refine and strengthen the fundraising **roles of each CICOA board**.
- f. Continue to pursue and secure diverse philanthropic funds to supplement project and program revenue.
 - i. Consider hiring an **additional fundraiser** to strengthen charitable fundraising efforts through increase sponsorships, individual giving, and major gifts.
 - ii. Focus on the **"grateful patient" fundraising model** by empowering those who self-identify with CICOA's mission to act as community ambassadors and fundraisers.
- g. Enhance advocacy efforts with legislators and government agencies to encourage public funding opportunities for programs and services.

