

**AGING SERVICES COLLABORATIVE (ASC) OF SANTA CLARA COUNTY**

**STRATEGIC PLANNING RETREAT**

**26 March 2010 • Vineland Branch Library, San Jose**

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**MISSION STATEMENT**

**The Aging Services Collaborative (ASC) is a consortium of organizations and individuals working together to provide leadership and build community-wide capacity to support, maintain, and promote the well-being of older adults and their caregivers in Santa Clara County.**

**VISION STATEMENT**

**Our vision is that older adults of all ages and diverse cultures are valued members of the community, are actively engaged, and have a range of options that meet their diverse needs as they age in place.**

**THREE-YEAR GOALS**

2010-2013 \* not in priority order

- ▶ **Be recognized as a leader for aging services in Santa Clara County**
- ▶ **Mobilize and coordinate advocacy efforts on behalf of seniors and their caregivers**
- ▶ **Optimize the effectiveness of the Aging Services Collaborative and its members**
- ▶ **Secure sustainable long-term funding for the Aging Services Collaborative**

**NEXT STEPS/FOLLOW-UP PROCESS**

<b>WHEN</b>	<b>WHO</b>	<b>WHAT</b>
Monday, March 29	Amy Aken	Distribute the retreat record to the ASC Executive Committee.
Wednesday, March 31	Amy Aken	Distribute the retreat record to all ASC members.
Within 48 hours of receipt	All recipients	Read the retreat record.
At the April 22, 2010 Executive Committee meeting	Executive Committee	Review the “Current Internal Weaknesses/Challenges” list for possible action items.
By April 30, 2010	Each ASC Member	Share the ASC Strategic Plan with their entire member organization or leadership team.
Monthly	Executive Committee	Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.
Monthly	Amy Aken	Prepare and distribute the updated Strategic Plan Monitoring Matrix to the entire ASC membership.
October 15, 2010 (Friday) 8:30/9:00 am – 4:00 pm	Executive Committee	Strategic Planning Retreat to: <ul style="list-style-type: none"> <li>- more thoroughly assess progress on the Goals and Strategic Objectives.</li> <li>- develop Core Values/Guiding Principles</li> <li>- develop Objectives for the next six months.</li> </ul>

## S.W.O.T. ANALYSIS

Strengths – Weaknesses - Opportunities - Threats

### THE STRENGTHS AND ACCOMPLISHMENTS OF THE AGING SERVICES COLLABORATIVE IN THE PAST YEAR

#### Brainstormed List of Perceptions

- We have an expanded Executive Committee
- Held a Caregiver Conference
- Broad representation of aging services
- Recruiting and training of co-chairs for the ASC teams
- We have the right people on the Executive Team – people with the power to make changes
- A more developed website
- Distributed over 400 COA (Council on Aging) directories
- Secured funding from the Council on Aging
- Secured funding (over \$5,000) for the Caregiver Conference
- Participants are more aware of each other's services
- Professional development presentations have met the needs of providers (according to evaluations)
- Some members came together with a joint proposal to AmeriCorps
- The Advocacy group has recently identified some potential partners
- We have strong community partnerships
- Our membership is growing; we've received 5-7 requests to join each month
- We've focused on achieving our goals in the past year
- Increased cohesion and collegiality
- We put an Evaluation Plan in place to evaluate the work of the Collaborative
- Increased visibility in the community
- Increasing education about the well-being of older adults
- Steve (ASC chair) and Marilou (ASC vice chair) really give the organization clout
- Completed our bylaws
- We hold professional presentations every other month
- Brown bag lunches with professional development speakers
- Fostering regular networking opportunities
- Branding identification, including a logo
- Increasing community identity and awareness
- Distributed 8,000-10,000 Caregiver Resource brochures in two distributions
- Meeting schedules for the Collaborative have been better; we now meet every other month instead of monthly and the meetings are more productive
- Really like the administrative support given by Amy of The Health Trust; she communicates well with ASC and keeps us on track
- We shared best practices in five of our professional presentations
- We have a newly created Advocacy Committee
- Strong commitment of the Executive Team to the success of ASC
- Awarded a grant with County of Santa Clara funding to develop an online housing search database that serves older adults
- Collaborated with the Council on Aging to build a caregiver webpage on the COA site

## **CURRENT INTERNAL WEAKNESSES/CHALLENGES**

Brainstormed List of Perceptions

- Our relationships with other stakeholders has not gelled (Consulting Council)
- Lack of external visibility
- Some members of work groups are pushing their own agendas. Is that a lack of understanding of what we're about?
- We're not clear about the relationship between the Executive Team and the Community for a Lifetime Plan
- Lack of promotion of ASC achievements
- Lack of shared responsibility for funding
- Lack of long-term financial resources
- Not using our website/technology well enough
- Struggle getting chairs and co-chairs
- Lack sufficient staff support
- Still some lack of clarity around the mission/purpose of the Collaborative
- There are many, many meetings when you're on the Executive Committee
- The Health Trust staff is overworked; limitations of staff time; potential burnout
- Folks who have left ASC have left because they could not advance their own agenda
- Lack of participation from larger ASC members due to lack of time
- Community for a Lifetime is not followed exactly as outlined
- Not enough diversity represented in the larger ASC
- Competing pressures limiting participation
- Inconsistent presence of Executive Team members
- Don't know what "working together" as stated in the Mission Statement looks like
- To date, a lack of an accomplishment big enough to get the attention of policymakers

## **EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A POSITIVE IMPACT ON ASC IN THE NEXT THREE YEARS**

Brainstormed List of Perceptions

- Reauthorization of the Older Americans Act
- Health care reform
- Retiring baby boomers willing to do volunteer work
- Changing demographics
- Economic downturn (causing us to think more creatively)
- More senior voters
- SCAN Foundation is looking at getting aging collaborative throughout the state to work together
- Potential of the two-thirds vote requirement for the state budget being changed
- Increased focus on wellness in a lot of sectors
- Availability of volunteers
- Don Weden's presentations on livability for older adults
- With their growing numbers, older adults will become advocates, more participatory
- Growing recognition of the importance of addressing the changing demographics (increasing seniors)
- Potential of available additional federal funding
- Growth of social media/marketing
- Increased interest in aging by policymakers
- Funders' preference to support collaborations, rather than individual organizations
- New governor
- San Jose State University's Center for Healthy Aging
- Availability of interns from universities and AmeriCorps

## **EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A NEGATIVE IMPACT ON ASC IN THE NEXT THREE YEARS**

Brainstormed List of Perceptions

- Changing demographics
- Health care industry
- Decrease in the number of foundations that want to fund senior programs and services
- Reduction in the number of gerontology programs in universities
- Public sector places less priority on senior services
- Ageism
- Impact of the downturn of the economy on seniors
- Government funding cuts
- Reduction in staffing in CBOs impacts staff remaining behind and limits participation in ASC
- California's state budget crisis
- Reduction in CBOs' and other agencies' staffing
- Inadequate number of professionals being trained to work with seniors
- Ignorance about long-term care



## **IDENTIFY THREE-YEAR GOALS**

Brainstormed list of potential goals from which the Three-Year Goals were developed

- Communicate our agenda to key stakeholders
- Secure long-term funding
- Do something big
- Address the economic reality of Santa Clara County's seniors
- Create clarity around the mission/purpose of the organization
- Increase ASC visibility
- Impact changes in the aging service system
- Engage better the leaders who impact older adults
- Become the "go to" organization for aging matters
- Increase our advocacy capacity
- Create one thing "new" and exciting
- Expand aging services through collaborations and partnerships
- Have a successful major advocacy effort
- Increase participation in ASC (e.g., diverse communities, older adults)
- Improve leadership and coordination of aging services
- Coordinate funding priorities with lead agencies
- Develop clarity and consensus around the purpose and activities of the ASC
- Provide technical assistance and professional development
- Optimize the effectiveness of the ASC
- Advocate for the needs of seniors

# STRATEGIC PLANNING ELEMENTS

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## "SWOT" ANALYSIS

Assess the organization's:

- Internal Strengths      - Internal Weaknesses
- External Opportunities      - External Threats

## MISSION/PURPOSE STATEMENT

States WHY the organization exists and WHOM it serves

## VISION STATEMENT

A vivid, descriptive image of the future – what the organization will BECOME

## CORE VALUES

What the organization values, recognizes and rewards – strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency and repetition

## THREE YEAR GOALS

WHAT the organization needs to accomplish (consistent with the Mission and moving the organization towards its Vision) – usually limited to 4 or 5 key areas

## KEY PERFORMANCE MEASURES

What success will look like upon achievement of the goal

## SIX MONTH STRATEGIC OBJECTIVES

HOW the Goals will be addressed: By when, who is accountable to do what for each of the Goals

## FOLLOW-UP PROCESS

Regular, timely monitoring of progress on the goals and objectives; includes setting new objectives every six months