



# **STRATEGIC PLAN**

**January 2027 - December 2029**

Approved by the Board of Directors on \_\_\_\_\_

## STRATEGIC PLAN

January 2027 - December 2029

The Area Agency on Aging of Pasco-Pinellas initiates this strategic plan reflective of critical priorities and strategies for organizational operations, innovation, growth, and sustainability. This strategic plan demonstrates a continued commitment to older adults and their caregivers in Pasco and Pinellas Counties, Florida. This plan is a “living” document that will be updated and can be revised as it is implemented.

### MISSION STATEMENT

A trusted resource to advocate, educate, and empower seniors, adults with disabilities, and caregivers which promotes independence, in partnership with the community

### VISION STATEMENT

Our community will provide older adults, people with disabilities, and caregivers with the resources and services needed to maintain independence, promote healthy aging, and live an optimal quality of life

### VALUES STATEMENT

The Area Agency on Aging of Pasco-Pinellas regards all seniors and persons with disabilities as valued members of our community who merit dignity, respect, and the resources for optimal quality of life

### GOAL STATEMENTS

Build the capacity for revenue generation, operational and programmatic innovation, and mission-driven impact

Increase the community role and response in delivering high-quality services in Pasco and Pinellas Counties

| PRIORITIES                         | OBJECTIVES                                                             |
|------------------------------------|------------------------------------------------------------------------|
| Funding & Financial Sustainability | Diversify revenue to advance agency operations, resilience, and growth |
| Organizational Capacity Building   | Strengthen agency operational infrastructure for mission fulfillment   |
| Workforce Investment               | Develop the agency workforce for organizational sustainability         |
| Community Responsiveness           | Expand community access to aging-in-place supports                     |

## 2027 - 2029 STRATEGIC PLAN OVERVIEW

|                |                                                                                                                                                                                                               |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>MISSION</b> | A trusted resource to advocate, educate, and empower seniors, adults with disabilities, and caregivers which promotes independence, in partnership with the community                                         |
| <b>VISION</b>  | Our community will provide older adults, people with disabilities, and caregivers with the resources and services needed to maintain independence, promote healthy aging, and live an optimal quality of life |
| <b>VALUES</b>  | The Area Agency on Aging of Pasco-Pinellas regards all seniors and persons with disabilities as valued members of our community who merit dignity, respect, and the resources for optimal quality of life     |

|                       |                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                         |                                                                                                                                                                                                                                      |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>GOALS</b>          | Build the capacity for revenue generation, operational and programmatic innovation, and mission-driven impact<br>Increase the community role and response in delivering high-quality services in Pasco and Pinellas Counties        |                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                         |                                                                                                                                                                                                                                      |
| <b>PRIORITY AREAS</b> | Funding & Financial Sustainability                                                                                                                                                                                                  | Organizational Capacity Building                                                                                                                                                                                                                                                                 | Workforce Investment                                                                                                                                                                                                    | Community Responsiveness                                                                                                                                                                                                             |
| <b>OBJECTIVES</b>     | Diversify revenue to advance agency operations, resilience, and growth                                                                                                                                                              | Strengthen agency operational infrastructure for mission fulfillment                                                                                                                                                                                                                             | Develop the agency workforce for organizational sustainability                                                                                                                                                          | Expand community access to aging-in-place supports                                                                                                                                                                                   |
| <b>STRATEGIES</b>     | <ul style="list-style-type: none"> <li>- Annual fundraising plan</li> <li>- Ambassador initiative</li> <li>- Social media presence</li> <li>- Planned giving</li> <li>- Grants acquisition</li> <li>- Board give and get</li> </ul> | <ul style="list-style-type: none"> <li>- Technology assessment and deployment</li> <li>- Business development and community relations position</li> <li>- Community collaboration</li> <li>- Volunteers/interns' recruitment and management</li> <li>- Board professional development</li> </ul> | <ul style="list-style-type: none"> <li>- Staffing and compensation analysis</li> <li>- Agency succession planning</li> <li>- Team member professional development and support</li> <li>- Team lead positions</li> </ul> | <ul style="list-style-type: none"> <li>- Board of Directors' Speakers bureau</li> <li>- Collaborative marketing and partnership</li> <li>- Housing initiative and advocacy</li> <li>- In-home care and caregiver services</li> </ul> |

## FUNDING & FINANCIAL SUSTAINABILITY

**OBJECTIVE:** Diversify revenue to advance agency operations, resilience, and growth

| STRATEGIES                                                                                                                  | LEAD RESPONSIBILITY                                  | TIME FRAME                                    | SUCCESS MEASURES                                                                                                                                                      | RESOURCES                                                                                      | PROGRESS |
|-----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|-----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------|
| Develop and implement an annual fundraising plan                                                                            | Director of Strategic Advancement                    | January 2027 and annually thereafter          | Documented and presented fundraising plan, Executed and increased targeted fundraising activities in both Pasco and Pinellas Counties, Increased unrestricted revenue | Funding Workgroup, Executive Director                                                          |          |
| Launch an ambassador initiative with trained board and advisory council members as well as community leaders and volunteers | Funding Workgroup                                    | December 2027 and ongoing thereafter          | 100% board and advisory council fundraising support, Number and amount of donations and contributions, Increased unrestricted revenue                                 | Director of Strategic Advancement, Executive Director, Board members, Advisory Council members |          |
| Create and post educational social media content to build a story for agency donations and contributions                    | Director of Strategic Advancement / Outreach Manager | Through December 2027 and annually thereafter | Number and quality of social media, testimonials, and storytelling narrative; Increased unrestricted revenue                                                          | Funding Workgroup, Program Team, Board members, Advisory Council members                       |          |

|                                                                 |                                   |                                               |                                                                                           |                                                            |  |
|-----------------------------------------------------------------|-----------------------------------|-----------------------------------------------|-------------------------------------------------------------------------------------------|------------------------------------------------------------|--|
| Increase planned giving contributions                           | Director of Strategic Advancement | Through December 2029                         | Number of designations, Number and amount of legacy gifts, Increased unrestricted revenue | Funding Workgroup, Board members, Advisory Council members |  |
| Increase grant research, applications, and funding acquisitions | Contracted Grant Writer           | Through December 2027 and annually thereafter | Number of grant applications, Number and amount of grant awards                           | Program Team, Executive Director, Funding Workgroup        |  |
| Explore a board of directors' give and get policy               | Funding Workgroup                 | March 2027                                    | Increased board fundraising support, Increased unrestricted revenue                       | Board members, Executive Director                          |  |

## ORGANIZATIONAL CAPACITY BUILDING

| <b>OBJECTIVE:</b> Strengthen agency operational infrastructure for mission fulfillment                                                          |                            |                   |                                                                                                            |                                                                                               |                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|-------------------|------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|-----------------|
| <b>STRATEGIES</b>                                                                                                                               | <b>LEAD RESPONSIBILITY</b> | <b>TIME FRAME</b> | <b>SUCCESS MEASURES</b>                                                                                    | <b>RESOURCES</b>                                                                              | <b>PROGRESS</b> |
| Assess budget feasibility and conduct an agency technology assessment inclusive of data security and artificial intelligence (AI) incorporation | Operations Workgroup       | June 2027         | Collected and analyzed information and data, Published and presented analysis report                       | IT Team, Executive Team, External consultant                                                  |                 |
| Assess budget feasibility and upgrade and deploy new technology in administrative and financial operations                                      | Operations Workgroup       | December 2027     | Increase operational automation and efficiency, Post-implementation evaluation and findings                | IT Team, Executive Team, External consultant                                                  |                 |
| Pilot AI to assist with workflow                                                                                                                | Operations Workgroup       | December 2027     | Improved caller and client navigation and care coordination, Post-implementation evaluation and findings   | IT Team, Executive Team, Program Team, External consultant                                    |                 |
| Assess budget feasibility and establish and hire business development and community relations position                                          | Executive Director         | December 2027     | Created job description, Selected and onboarded team member, Improved community partnerships and resources | Human Resources Manager, Executive Team, Director of Strategic Advancement, Funding Workgroup |                 |

|                                                                                                                                     |                                                      |                                       |                                                                                                                                                                          |                                                                     |  |
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| Leverage community partnerships and collaboration ( <i>ex: health care, housing, dementia, and caregiver agencies and systems</i> ) | Business Development and Community Relations Manager | Through December 2029                 | Increased programming and services' resources, Improved client care                                                                                                      | Program Team, Advisory Council members                              |  |
| Enhance volunteer and intern recruitment and management                                                                             | Operations Workgroup                                 | December 2027                         | Volunteer/intern job descriptions for each department, University memoranda of understanding, Developed and implemented recruitment plan, Increased operational capacity | Program Team, Human Resources Manager, Executive Team and Directors |  |
| Offer board professional training and development, particularly in non-profit governance and agency-specific information            | Board Executive Committee                            | December 2027 and annually thereafter | 100% board member participation; Improved board member competencies, engagement, practices, and support                                                                  | Executive Director, External consultant(s)                          |  |

## WORKFORCE INVESTMENT

| <b>OBJECTIVE:</b> Develop the agency workforce for organizational sustainability                                     |                            |                                        |                                                                                                                                  |                                                       |                 |
|----------------------------------------------------------------------------------------------------------------------|----------------------------|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|-----------------|
| <b>STRATEGIES</b>                                                                                                    | <b>LEAD RESPONSIBILITY</b> | <b>TIME FRAME</b>                      | <b>SUCCESS MEASURES</b>                                                                                                          | <b>RESOURCES</b>                                      | <b>PROGRESS</b> |
| Assess budget feasibility and conduct a staffing and compensation analysis and enhance agency staffing as applicable | Workforce Workgroup        | January 2027 and biannually thereafter | Adequate staffing pattern, Competitive compensation for team members                                                             | Human Resources Manager, Executive Team               |                 |
| Implement agency succession planning at all key levels                                                               | Workforce Workgroup        | March 2027 and ongoing thereafter      | Established policy and protocol, Identified potential successors, Offered training and mentorship                                | Human Resources Manager, Executive Team and Directors |                 |
| Enhance workforce professional development and support                                                               | Workforce Workgroup        | December 2027 and ongoing thereafter   | Inventory of EAP offerings, Completed team training, Increased team competencies, Improved team morale, Increased team retention | Human Resources Manager, Executive Team and Directors |                 |
| Assess budget feasibility and develop team lead positions                                                            | Workforce Workgroup        | July 2028                              | Identified team lead opportunities, Developed team lead job descriptions, Talent promotion and retention                         | Human Resources Manager, Executive Team and Directors |                 |

## COMMUNITY RESPONSIVENESS

| <b>OBJECTIVE:</b> Expand community access to aging-in-place supports                  |                                              |                                    |                                                                                                                                                  |                                                                                                |                 |
|---------------------------------------------------------------------------------------|----------------------------------------------|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|-----------------|
| <b>STRATEGIES</b>                                                                     | <b>LEAD RESPONSIBILITY</b>                   | <b>TIME FRAME</b>                  | <b>SUCCESS MEASURES</b>                                                                                                                          | <b>RESOURCES</b>                                                                               | <b>PROGRESS</b> |
| Develop and launch a Board of Directors' speakers' bureau to further enhance outreach | Services and Marketing Workgroup             | August 2027 and ongoing thereafter | Number of speakers, Number and quality of presentations, Increased community presence and awareness, Increased client engagement                 | Outreach Manager, Community partners and volunteers                                            |                 |
| Engage in collaborative marketing and partnerships                                    | Services and Marketing Workgroup             | June 2027 and ongoing thereafter   | Increased community presence and awareness, Increased client engagement                                                                          | Chief Operating Officer, Community partners                                                    |                 |
| Advance the agency's housing initiative and advocacy                                  | Executive Director / Chief Financial Officer | Through December 2029              | Closed property; Secured developer; Housing community groundbreaking; Pasco County satellite office, improved presence, and community engagement | Services and Marketing Workgroup, Executive Team, Program Team, Community partners and funders |                 |
| Address in-home care and caregiver service needs                                      | Services and Marketing Workgroup             | Through December 2029              | Increased funding and capacity, Increased client reach, Decreased pre-enrollment list                                                            | Chief Operating Officer, Program Team, Funders                                                 |                 |