



STRATEGIC PLAN

January 2027 - December 2029

Approved by the Board of Directors on September 21, 2026



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

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

GOALS	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			
PRIORITY AREAS	Funding & Financial Sustainability	Organizational Capacity Building	Workforce Investment	Community Responsiveness
OBJECTIVES	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
STRATEGIES	- Annual fundraising plan - Ambassador initiative - Social media presence - Planned giving - Grants acquisition - Board give and get	- Technology assessment and deployment - Business development and community relations position - Community collaboration - Volunteers/interns' recruitment and management - Board professional development	- Staffing and compensation analysis - Agency succession planning - Team member professional development and support - Team lead positions	- Board of Directors' Speakers bureau - Collaborative marketing and partnership - Housing initiative and advocacy - In-home care and caregiver services



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

OBJECTIVE: Strengthen agency operational infrastructure for mission fulfillment					
STRATEGIES	LEAD RESPONSIBILITY	TIME FRAME	SUCCESS MEASURES	RESOURCES	PROGRESS
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	

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

OBJECTIVE: Develop the agency workforce for organizational sustainability					
STRATEGIES	LEAD RESPONSIBILITY	TIME FRAME	SUCCESS MEASURES	RESOURCES	PROGRESS
Assess budget feasibility and conduct a staffing and compensation analysis and enhance agency staffing as applicable	Workforce Workgroup	January 2027 and tri-annually 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

OBJECTIVE: Expand community access to aging-in-place supports					
STRATEGIES	LEAD RESPONSIBILITY	TIME FRAME	SUCCESS MEASURES	RESOURCES	PROGRESS
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	