



Strategic Goals 2018 – 2020

Investing in People, Families and Communities

VISION:	Every neighbor in our region will have a CHOICE and range of services that will assist them to remain independent in their chosen home.
MISSION:	To deliver the programs and services people of all ages need to live independently in their communities for as long as possible.
SWOT:	<p data-bbox="259 798 402 829"><i>Strengths</i></p> <ul data-bbox="418 798 1537 976" style="list-style-type: none"> • Dedicated and experienced staff with expertise in service areas. • Strong Board Director support and involvement in policy, planning and other governance activities. • Increasingly diverse funding sources. • Solid financial, technological and communications position. <p data-bbox="219 1029 402 1060"><i>Weaknesses</i></p> <ul data-bbox="418 1018 1537 1228" style="list-style-type: none"> • Maximizing use of technology to generate meaningful analytical and predictive data. • Marketing and communications in increasingly competitive markets for healthcare, housing, transit and other services. • Insufficient resources to pursue opportunities / development while managing current program. <p data-bbox="211 1281 402 1312"><i>Opportunities</i></p> <ul data-bbox="418 1270 1537 1659" style="list-style-type: none"> • Focusing on social strategies for communications buttressed by other media and event platforms. • Focusing on developing information technology as an underlying necessity for success. • Expanding fiscal management services for the Veteran-Directed Home and Community Based Services program. • Developing new low income tax credits and expanding service regions for programs such as single-family housing, insurance counseling and health supports. • Increase funding opportunities from new resources and growing the Bay Aging Foundation. <p data-bbox="284 1701 402 1732"><i>Threats</i></p> <ul data-bbox="418 1701 1537 1877" style="list-style-type: none"> • Managing rapid growth. • Uncertainty in projections and abilities for delegated members in VAAACares® (Virginia Area Agencies on Aging Caring for the Commonwealth). • Difficulty in recruiting talented, diverse workforce in rural area. • Federal budget cuts. Any cut is significant.

TRENDS –

By 2020, 38% of people living in the Northern Neck and 30% of Middle Peninsula residents will be 60 and older. That is a 5 to 6% increase from 2010! As generations age, they affect the types of services in demand – health, transportation and housing. Social risk factors, which are interconnected, significantly impact one’s ability to meet their own needs and the needs of their family. The top five needs that emerged through multiple community-wide needs assessments are: 1) transportation; 2) health services (home care and wellness checks); 3) Affordable housing and home repair; 4) employment and self-sufficiency; and 5) education (including workforce training and vocational training). Attaining skills in income management through financial counseling was also considered a high need.

CORE GOALS –

- Develop and deliver services that improve the quality of life for residents of the region.
- Enhance the financial viability of Bay Aging.
- Provide a professional, supportive environment where Bay Aging employees can flourish.
- Enhance community awareness and marketability of services to meet community needs and maximize Bay Aging’s assets.

OVER-RIDING STRATEGIES –

- Focus on social strategies for communications buttressed by other media and event platforms.
- Focus on developing information technology as underlying necessity for success.
- Expand fiscal management services for the Veteran-Directed Home and Community Based Services program.
- Increase funding opportunities from new resources that expand services and build a strong Foundation.

DEPARTMENTAL OBJECTIVES / TACTICS –

TRANSPORTATION

- Reduce operating expenses by 5% of FY17 expenses or by \$154,000.
- Maintain steady ridership level of approximately 147,000 rides.
- Support automated dispatch and scheduling software to maximize operational efficiency and effectiveness.
- Locate at least one new subcontractor to help meet the demand for non-emergency medical transportation for seniors and people with disabilities. An additional provider will help Bay Transit cover the region better.
- Conduct community outreach in each of the ten counties in the primary service region served by Bay Transit.

HEALTH

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| <i>Transitional Care</i> | <ul style="list-style-type: none">• Submit a 2018-2019 Care Transitions Intervention (CTI) proposal to four Managed Care Organizations (MCOs) in Virginia; an increase of two additional MCOs will provide needed health services to their membership.• Identify 8 Virginia Medicare Advantage Plans and submit CTI proposals to at least 4 of the plans identified; 50% will become CTI partners.• Improve data and reports for quality assurance.• Improve feedback and training to AAA partners to ensure success. |
| <i>Adult Day Health Services</i> | <ul style="list-style-type: none">• Increase attendance hours by 10% at both centers. This goal will increase service hours at Gloucester Adult Day Care by 150 per month and 86 hours per month for the Essex Adult Day Care. |
| <i>Home Care</i> | <ul style="list-style-type: none">• Increase aide recruitment activities to grow the aide pool by 20% to add 16 staff members to the pool. This will allow service delivery for up to 20 additional clients. |
| <i>Care Coordination</i> | <ul style="list-style-type: none">• Acquire software to track performance and to evaluate staff outcomes, and to generate better data analysis and quality assurance reporting. |
| <i>Active Lifestyle Centers</i> | <ul style="list-style-type: none">• Increase participation in centers by at least 23 people or an overall increase of 10% through marketing, activity scheduling and special events.• Identify at least one additional local business to prepare hot meals for Meals on Wheels clients.• Identify and secure a new location for the Middle King William Active Lifestyle Center.• Develop a “floater options counselor” position to complete quarterly veteran assessments and new hires, allowing other options counselors in charge of new referrals more time to schedule home visits and annual reassessments. |

Health continued ...

Veteran-Directed Home & Community Based Services (VDHCBS)

- Refine geographic-centered placement of veteran cases per Options Counselor to reduce “windshield time” and travel expense.
- Increase referrals by 10 veterans who reside in the Middle Peninsula / Northern Neck to Bay Aging from veteran’s administration medical centers.
- Identify and target veteran’s administration medical centers and partner AAAs not currently providing VDHCBS for partnership opportunities.
- Streamline and automate budget management and statement production.

Senior Employment Training

- Recruit 2 eligible seniors for training; one from King and Queen County and the other from Mathews County.
- Increase unsubsidized employment of candidates to 4, a 100% increase.

Virginia Insurance Counseling and Assistance Program (VICAP)

- Increase the number of client contacts by 5% or 42 contacts to equal 897. Volunteers are the key to the program’s success. Maintain core group of seven volunteers who are already trained and recruit other people who have experience with Medicare and related insurances to increase reach.
- Increase the number of outreach events in the service area by 10% or 2 events to equal 20.

Ombudsman

- Conduct community outreach at nursing facilities and assistive living facilities to include 21 sites in the service area. Increasing outreach by reaching 10 facilities with non-compliant visits and/or meeting with family/ resident councils.

BAY HOUSING

Multi-Family

Age-Restricted Rental Housing

- Develop awarded Bay Aging operated rental housing community with the potential of reducing senior housing waiting list by 40 people or 7-10%.
- Develop a more structured and objective system for vetting and committing to for-profit LIHTC partnership opportunities.
- Identify and implement ways to provide more efficient and effective property management and resident service coordination through improved technology and logistical systems. Enhance reporting on same.

Northern Neck Middle Peninsula Housing Coalition (NNMPHC)

- Determine financial viability, logistics and community responsibility of acting as Department of Housing and Community Development recognized lead agency and primary coordinated point of contact for the NNMPHC.

Housing Choice Voucher Program (HCVP)

- Develop ways to improve landlord recruitment and retention to keep 10 landlords and/or 10% of landlords enrolled in the program.

Bay Housing
continued ...

**Single-Family and
Planning and
Development**

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| <i>Weatherization</i> | <ul style="list-style-type: none">• Expand existing weatherization territory by 2 counties and weatherization overall funding by 20%. |
| <i>USDA 504 Loan Packaging</i> | <ul style="list-style-type: none">• Increase program to include the entire expanded weatherization service area which will be covered under the USDA Loan Packaging MOU by at least 20%. |
| <i>Temporary Assistance to Needy Families</i> | <ul style="list-style-type: none">• Use increased TANF allocations to expand by 3 organizations (20%) Bay Aging's community/non-profit partnerships and network of service providers. |
| <i>Support and Services at Home (SASH)</i> | <ul style="list-style-type: none">• Develop one pilot SASH project located in Bay Aging's service region of clustered support services (i.e. Daffodil Gardens, Riverside Hospital, Gloucester Adult Day Care, Gloucester Bay Transit) |
| <i>Direct Mail Fund Raising</i> | <ul style="list-style-type: none">• Execute two direct mail fund raising campaigns and cultivating new donor prospects through the addition of the web, social media and email lists and raising between \$5,000 and \$10,000. |
| <i>Public Relations</i> | <ul style="list-style-type: none">• Develop and submit news, informational or educational pieces through newspapers and social media.• Re-design Bay Aging web site, brochures and other materials using new rebranding package. |

ADMINISTRATION

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| Counsel to the President | <ul style="list-style-type: none">• Provide advice and assistance to the CEO in a manner that accommodates and facilitates the accomplishment of strategic goals and program objectives.• Advise and assist Senior Leadership Team and other managers in accomplishing their strategic and program goals through consultation (phone, email or in-person meetings and discussions), policy and procedure development and updates, document development and/or review, and other assistance as requested.• Manage and supervise the accomplishment of the strategic goals of the managers of Advocacy Resources and Senior Employment operations.• Update statutory, regulatory and other legal structural and documentary requirements for Bay Aging and all its affiliate organizations (Foundation, apartments boards, limited liability corporations and other subsidiaries VAAACares®, EVCTP, Bay Home Care, Bay Housing, New Freedom, etc.) to assure all are in compliance with requirements. |
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Administration

continued ...

Information Technology

- Move to MS 365 Platform, enhancing system access and ensuring better up-time and disaster recovering capabilities.
- Continue to upgrade and enhance system infrastructure, including power redundancy, data backup and security.

Development

- Enhance / grow Bay Aging Foundation.
- Develop targeted outreach to the business and religious communities.
- Build staff expertise in communications and marketing.

Human Resources

- Hire a Human Resources Director and acquire the software needed to enhance human resources functions.