



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: Deliver the programs and services people of all ages need to live independently in their communities for as long as possible.

STRATEGIC PLAN 2019—2022

Information & Analytics

Develop information technology as an underlying necessity for success by generating and utilizing meaningful, analytical data.

- Acquire software to track performance, capture demographics, evaluate outcomes and generate meaningful data analysis and quality assurance reporting for all services delivered through Bay Aging.
- Use qualitative and quantitative data to help guide the decision making process.
- Engage Results Oriented Management Accountability (ROMA) principles of Assessment, Planning, Implementation, Achievement of Results, Evaluation and Reassessment.
- Documenting the achievement of results of how Bay Aging can prove that it is a winner in changing lives and improving communities.

Leadership

Create a professional and supportive environment where leaders are developed across the entire Bay Aging care continuum.

- Bay Aging is recognized as a reputable source of trusted information, resources and services. In several instances Bay Aging services go well outside the boundary of the traditional service area of the Middle Peninsula and Northern Neck in order to meet the needs of a rapidly growing older adult population throughout Virginia.
- Deliberately work to recruit, train and provide leadership development across the entire Bay Aging care continuum to ensure a new generation of leadership is equipped to provide the continuity of these services into the future.

Innovation

Increase Bay Aging's impact through research, engagement, influence and leadership at the local, state and national level

- Departments achieve accreditation to show Bay Aging can provide high quality services and have something valuable to bring to the table when joining other high level stakeholders.
- Attract more stakeholders at the local, state and national levels to support innovative projects.
- Improve Bay Aging presence on the web, email, media and social media to impart relevant and useful information for people seeking services, and increase opportunities for fee-for-service and private pay business opportunities.
- Expand to engage with local, state and national influencers to deliver services that boomers are looking for now and what will be needed in coming decades.

Consumer Engagement

Empower consumers to use the information and tools Bay Aging provides to assert a more active role in living healthy and independently.

- Develop tools that make it easier for people to request services, seek employment and donate.
- Revise Bay Aging marketing materials to create a consistent message and provide information and tools that will help people meet their needs.
- Increase opportunities to keep stakeholders, donors and consumers of services informed and engaged.
- Expand volunteer program to provide more opportunities to engage citizens of all ages to lend their time and talents to make life better for people of all ages.
- Develop direct mail or fundraiser to further elevate Bay Aging's presence in the region.

INFORMATION AND ANALYTICS: Page 1 of 2

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Grow the number of Leads, Accounts, Contacts and Opportunities in Salesforce by 25% including developing a substantial prospective donor database. (Currently 618 Accounts).	Database will facilitate ongoing management of client and prospect relationships and allow for empirical measurement of prospecting efforts with potential grants and donors.	An increase of 25% in database size and documentation of 100% of all donations received to measure ROI from development campaigns..	Customized Salesforce Reports including Grant Opportunities Reports and New Donor Reports.	Salesforce.	Real time reports can be generated on demand and can be presented to the SLT and/or Bay Aging Foundation board meetings.
Launch and maintain an Editorial Calendar that can be shared across the organization to better coordinate outreach, public information, public relations, awareness raising and educational efforts.	Shared calendar will result in better coordination of efforts organization wide and ensure that Bay Aging leverages its investment in chamber of commerce memberships, etc.	Increased use of the Editorial Calendar (MS Outlook) among SLT and relevant Bay Aging staff.	Measure and monitor through Outlook.	Outlook.	Disseminate current and next months' Editorial Calendars at SLTs.
Will maintain a record of donations and grant funding.	Records will show information about funders, track donations, purpose and more for future asks.	100% of donations will be recorded in the database.	Copies of checks, donation letters, funding letters, grant documents are entered into Salesforce.	Data entered into Salesforce. Salesforce can generate myriad reports.	Monthly.
Engage Results Oriented Management Accountability (ROMA) principles in Bay Aging activities.	Quarterly ROMA trainings for SLT will result in better understanding of ROMA principles and the role of community action in Bay Aging.	30 people or 100% of SLT and the Bay Aging Board of Directors will achieve the outcomes described.	ROMA logic model.	Quarterly.	
Will work to use existing program reporting systems to document program progress for Single Family Housing.	Reports will document efforts made and funds expended to help clients in need.	50 clients will receive services that increase the Virginia Minimum Housing Quality Standards of their homes.	Program Records.	Data Collected from CSBG Reporter, DHCD CAMS, and Hancock Weatherization Reporting Software.	Quarterly and Annually.
Residential and commercial property management task/project identification, prioritization, assignment, tracking & resolution system.	Tasks are addressed and completed with comprehensive team awareness.	Rental housing and office space occupied by roughly 350 residents, commercial tenants and Bay Aging workforce.	Project/task tracking summary Excel spreadsheet.	Property management work order system & manager input.	Daily.
Implement a cross-program data tracking software that can be utilized to track comprehensive care. (Multi-Family Housing)	Bay Aging can identify and strengthen core service "prescriptions" to maintain client self-sufficiency.	100% of clients will receive more than one service. Clients who receive more than one service will have fewer emergency needs reported (hospitalization, financial emergencies, homelessness)	Reporting systems within data tracking. CAA could make referrals for a program that fits Bay Aging's multidisciplinary needs.	Client data will be inputted by EVERY department.	Data should be entered monthly.
Will use and report from new STARS VICAP reporting system.	Records will show detailed information on demographics of clients in each county/ city and what services were provided.	900 clients from Northern Neck/ Middle Peninsula and 1,500 from the Peninsula or 100% received information, education and referral.	STARS reporting system	Beneficiary Contact Form	Monthly and quarterly report to community action.

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Monitor On-Time Percentage (OTP) for each of our 4 Deviated Fixed Routes. (DFR)	Each DFR will maintain an OTP of 80% or better.	The 4 DFR's will have an 80% OTP for each stop along the route.	On board tablet.	Route Match.	Data is collected daily and reported monthly.
Will maintain a record of education material dispensed and referrals to other services by Options Counselors and Active Lifestyle Center managers.	Records will show what materials were dispensed and referrals made to help ensure self-sufficiency.	100% of clients will receive access to information/education and referrals to services if needed. 100% of congregate and MOWs clients will receive nutrition education quarterly.	Client records and surveys.	ALC and OC documentation, Peer Place and client satisfaction surveys.	Provide monthly public education report.
Will complete a minimum of 4 assessments for acquisition of new software for patient data collection, outcomes reporting & billing.	.Assessments will guide the selection of a suitable software to purchase	100% of client information will be captured providing outcomes, billing & reimbursement reconciliation	Newly selected software.	Newly selected software.	Data collection—daily Reporting—daily, monthly, quarterly, yearly.
Update VAAACares.	Website will have updated information and give people access to information regarding CTI and VAAACares Initiatives	12,000 or 50% of people will gain access to needed information	WebMaster.	WebMaster.	Quarterly.
Will complete 4 assessments for acquisition of new software for patient data collection, outcomes reporting and billing.	Assessment will guide the selection of a suitable software to purchase.	100% of client information will be captured providing outcomes, billing, reimbursements and reconciliation.	Newly selected software.	Newly selected software.	Data Collection—Daily Reporting—daily, weekly, monthly, quarterly, yearly.
Acquire electronic visit verification software.	Verification of aide visits to clients, efficient scheduling, improved documentation, better communication of client needs with staff	All clients receiving in home services will be tracked using this software.	Client records.	To be determined.	Daily/weekly/monthly.
Acquire software to track performance and evaluate staff outcomes for care coordination/case management activity with VAAACares.	Improved data collection and measurement of outcomes.	This software would be used for any future VAAACares contracts.	Client records.	To be determined.	Daily/weekly/monthly.
Full implementation of Office 365 by December 31, 2019.	Enhance Information Technology infrastructure and position the organization for future growth.				
Purchase EVV compliant software.	Allow veteran employers and employees to electronically submit timesheets for the Veteran Directed Care and employee access to paystubs/W-2's.				

LEADERSHIP: Page 1 of 2

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Begin succession planning for marketing and development to ensure a smooth transition when key staff retire.	New staff will be able to be integrated into the Marketing and Development team without any loss of momentum.	One or more new employees are hired and trained to ensure a seamless transition.	Report on succession planning activities.	Reports.	Quarterly.
Initiate the launch and execution of an internship program for Bay Aging's marketing and development program and Bay Transit's public transportation program.	Development of bench strength for two key areas of Bay Aging that might otherwise have critical staffing issues.	Ongoing participation in the Bay Aging internship program as well as partnership with RCC to both promote and guest lecture on these program areas.	Reports on internship program participation and accomplishments.	Reports.	Quarterly.
Begin succession planning for community action, development, and administration roles in Bay Aging.	Another person or persons(s) will be able to move forward with all activities now performed by the Development Director.	One or more persons will achieve outcomes.	Reports on succession planning activities.	Reports.	Weekly.
Will work to identify existing workers in Eastern Virginia Region who could be recruited to continue community action and Sing Family Housing programs in the future.	A list of target recruitment candidates for each of the positions in Community Action and Single Family Housing will be compiled.	3 Target Candidates will be identified for each of the current positions in Community Action and Single—Family Housing.	Completed List. Of Targeted Candidates.	List of Candidates will be compiled from existing knowledge of staff at other State, Regional, Local and Non-Profit Agencies located throughout Eastern Virginia.	Annually and On-going.
Bay Aging will contract to update the website to show a professional, meaningful, and accurate image of Bay Aging. Bay Aging will continue website presence by updating the website monthly. (Senior Apartments)	Bay Aging will increase engagement with consumers, internal workforce, human service business partners and investors/funders.	Website traffic (views, shares, mentions) will increase by 500%.	Webmaster monitoring on web platform.	WordPress.	Monthly.
All Multifamily Housing employees exposed to Senior Leadership Team meetings, participate in department staff meetings and attend community resource events.	Workforce have better understanding of internal & external relationships/projects.	100% of department to attend at least one SLT meeting and one community resource event annually.	Employee attendance spreadsheet.	Excel—employee reporting.	Monthly.
Will recruit one staff member to receive training to develop leadership within Bay Aging and VICAP specifically.	Bay Aging, specifically the VICAP program will have capable leaders to manage the program. Staff who will be rising leaders in Bay Aging.	One or 50% of staff will gain the gain the leadership skills needed to manage the VICAP program.* *VICAP has a very small staff of two.	Files will contain emails and other correspondence, training information and other documents.	Files related to this activity.	Monthly review.

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Identify current staff suitable to be a part of Bay Transit's succession plan. Recruit and retain new staff suitable to be a part of Bay Transit's succession plan.	Leaders will acquire the skills and management knowledge needed to operate Bay Transit.	Of the 6 people trained, 3 people or 50% will acquire the leadership and management skills within a 2 year period.	Training records.	Training records.	Progress to be reviewed quarterly.
Provide training, educational and conference attendance opportunities as appropriate. (Community Living)	Staff will complete trainings and educational certifications to advance knowledge in their field.	75% of staff.	Attendance logs, certifications.	Employee personnel file.	Quarterly to CLP Director.
National forums, trailblazer groups, thought-leader panel discussions, etc. (VAAACares)	Build and sustain leadership spotlight on VAAACares.	Participate in 4 national, regional, and state activities and provide information for publications.	Agenda's, Meeting Documents, .Published articles. Power Points.	Agenda's, Meeting Documents, .Published articles.	Quarterly.
Provide opportunities for Assistant Director to attend leadership conferences and other trainings to broaden experience and keep abreast of current trends in the healthcare provider industry. (Home Care)	Gain information, experience and skills.	1 or 100%.	Agendas and Meeting Documents.	Attendance Notes and Handouts.	Quarterly.
Increase home care aide recruitment activities.	The ability to deliver in home care to a greater number of clients.	Increase the aide pool by 20% to add 16 staff members to the pool. This will allow for up to 20 additional clients.	Monthly billing records, wait list referral list, home care census.	Monthly billing records, waitlist referral list, home care census.	Weekly/monthly.
Purchase, renovate and occupy the Urbanna Professional Center. Close of purchase no later than October 1, 2019. Complete renovations and occupy no later than March 31, 2020. (Finance)	Transformation of UPC into Bay Aging's consolidated Urbanna campus will also position the organization for future growth and enable much needed improvements to intra-office communication and collaboration.				
Provide training and development opportunities for staff to include military cultural competency and linguistic competency. (Veteran Directed Care)					

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Expand the recently launched partnership with Healthy Harvest Food Bank (HHFB) that supplements Meals on Wheels with fresh fruit and vegetables in Richmond and Essex Counties.	Expand the distribution of fresh fruits and vegetables across the Bay Aging Meals on Wheels service area including Mathews County.	Fresh fruits and vegetables are included with Meals on Wheels deliveries to 50% or more of current MOW recipients.	Reports on Meals on Wheels recipients who are receiving fresh fruit and vegetables.	Reports.	Monthly.
Will work to maintain the existing licenses and certifications that are required to carry out our Programs in our Region and throughout the Commonwealth.	Will create a training and tracking spreadsheet for the licensing and certification of all applicable staff, and Agency Licenses.	Required Agency Licenses and Certifications will be maintained; and will not be allowed to expire.	Current Copies of Agency Licenses that are valid; in good standing; and not expired.	Data Collected from DPOR, the Weatherization Training Center, DHCD, and BPI.	Ongoing.
Engage new community partners in community action and other activities.	Community partnerships will provide more visibility and additional support for Bay Aging programs and services. Partners may receive funds through TANF while others will provide referrals for services or will provide direct services.	10 or 100% of all new community partners will benefit in one or more ways as described.	Partner files, data reported to Bay Aging from partners.	Some data entered into Salesforce and other data entered into CSBG Reporter.	Quarterly.
Will work to retain the licensed and certified staff who are required to carry out Single Family Housing programs in the region and throughout the Commonwealth.	Will create a training and tracking spreadsheet for the licensing and certification of all applicable staff, and Agency Licenses.	Required staff Licenses and certifications will be maintained; and will not be allowed to expire.	Current Copies of Staff Licenses and Certifications that are valid; in good standing; and not expired.	Data Collected from DPOR, the Weatherization Training Center, DHCD, and BPI.	Ongoing.
Bay Aging will seek partnerships that can expand services in an innovative way. (Senior apartments.)	Services will increase engagement and fee-for-service.	Increased numbers of participants. Increased revenue. Increased donors.	Program reporting/attendance. Program income.	Fiscal management. Program case records.	Monthly
Bay Aging will prioritize services to ensure that the prescribed service is actually meeting the client need in the most efficient manner. (Senior apartments)	Programs will save money in the overall budget and clients will have increased self-sufficiency.	Operating costs/program expenses will decrease by 25% and client satisfaction/sufficiency will remain stable or increase.	Fiscal management and case notes.	Fiscal management. Data system/ case reporting.	Monthly
There are 4 Indian tribes in our area. I contacted them all and 1 responded so far. The representative said she would get back if anyone is interested.	Indian Tribe members will benefit from insurance counseling and education.	Of the 4 Tribes, 1 Tribe Elder agrees to VICAP information and counseling services made available to the members.	Files that contain meeting notes, emails, contacts made, etc.	Beneficiary Contact Form and files on each tribe.	Monthly and quarterly report to community action.

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Marketing and outreach to businesses to promote the advantages of advertising on the buses.	Increase the number of businesses who advertise on Bay Transit buses. Attain and maintain 75% capacity of available advertising space on the public transit vehicles.	Of the businesses contacted, 5% will advertise on Bay Transit buses. Bay Transit will fill at least 75% of available ad space on transit buses in full time service.	Advertising contracts.	Advertising contracts	Progress to be reviewed quarterly.
Expand the pilot with Healthy Harvest to include all counties.	Continue to supplement MOWs deliveries with fresh fruits and vegetables to all counties in the service area.	350 individuals receiving MOWs	Client records, delivery log.	Peer Place.	Monthly report to CLP Director and quarterly report to community action.
Research new programing to take advantage of new payment model opportunities from the Centers for Medicare and Medicaid Services.	Create new business opportunities.	Develop a new model for contracting.	Business files.	Business files.	Quarterly.
Increase Bay Aging's Care Transitions Intervention (CTI) impact through research, and engagement with healthcare providers and other grant related opportunities	Improve Bay Aging's CTI presence in our service area by implementing a new CTI model with an new contract.	100 patients.	Well Sky software or newly selected software.	Well Sky or newly selected software.	Daily, weekly, monthly, quarterly, yearly.
Work with VAAACares team to achieve contracts to provide care coordination/case management services to Medicare/Medicare Advantage plans.	Delivery of care and services to promote positive health outcomes, decrease health care costs, and reduce hospitalizations.	Will be determined by contract.	Under development..	To be determined.	Under development.
Chief Financial Officer will complete the 2019-2020 session of LEAD River Counties course.	Will further organization's depth of knowledge on issues across the service area.				
Explore pursuing a request for proposal for fiscal agent services for the Virginia Medicaid CCC+ program. (Veteran Directed Care)					
Partner with one or more Veterans administration medical centers to expand Veteran Directed Care.					

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Develop pay per click advertising and direct mail campaigns to grow Bay Aging's donor base.	Increase donor base and donations to the Bay Aging Foundation.	Grow the donor base and donations by 100% from FY 2018—2020.	Salesforce and Bay Aging Foundation financial reports.	Reports .	Monthly.
Develop consumer directed e-newsletter and grow the number of "subscribers".	Consumers will have information and education needed to make good decisions about accessing the services they need to live independently longer.	Grow the number of subscribers to 50 people in each county in Bay Aging's primary service area—10 counties or 500 people/100%.	Subscriber accounts.	Data collected from Mailchimp.	Provide monthly report to SCSEP and quarterly report to community action.
Will work to increase efficiency and effectiveness of current outreach for Single Family Housing.	Increase inquiries for Single Family Housing services.	20 more clients a year will apply for our Housing Services.	Client records.	Data Collected from DHCD CAMS, and Hancock Weatherization Reporting Software.	Quarterly and Annually.
Quarterly town hall-style meetings with residents at Bay Aging Apartment communities.	Greater consumer satisfaction.	Roughly 350 consumers.	Vacancy rate, turnover rate, survey response scoring.	Simply Computer Federal Housing Assistant (FHA) Software.	Quarterly.
Engage a social media team that can provide the human capital necessary to maintain a successful network for the apartments team.	Create a better awareness of Bay Aging senior apartment communities and control the public perception.	Increased clients/referrals, especially through a coordinated technology method (i.e., website, Facebook, etc.)	Counts of user mentions on social media (positive and negative) Counts of partner sharing/mentioning.	Facebook reporting.	Twice monthly.
To find and train one qualified VICAP volunteer from the Northern Neck/ Middle Peninsula.	Increase in Client Contacts and group presentations.	1 new trained VICAP volunteer.	STARS reporting system.	Beneficiary Contact Form and PAM entries.	Monthly and quarterly report to community action.
Acquire a smart phone application that will allow riders to request, book, confirm and cancel rides from their phone or computer.	Increase a rider's ability to manage their transportation. Decrease no shows and call volume to the transit offices.	20% of all riders will be able to access the application and utilize it within 2 years of implementation.	Amble app, and dispatch and scheduling logs.	Route Match.	Data is collected daily and reported monthly.
Expand Retire and Senior Volunteer program to add meal routes as needed.	Reduce delivery times and minimize the need for staff delivery of MOWs.	Grow volunteer base by 3%.	Client records.	Volunteer Reporter 6.5 and Route-Match.	Provide monthly report to RSVP director and quarterly report to community action.

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Offer Matter of Balance workshops at all Active Lifestyle Centers.	Conduct 8 week workshops at ALCs to provide education on fall risks and how to increase strength and balance	50 individual completers.	Client records, attendance logs.	Peer Place.	Provide a monthly report to Quality Assurance Analyst.
Sell services to healthcare providers (hospital systems, skilled nursing facilities, insurance plans, accountable care organizations, physicians, managed care organizations and others.	Contracts.	One significant contract.	Contract.	Contract.	Quarterly.
Increase Bay Aging's Care Transitions Intervention impact and revenue stream by securing new territories for Bay Aging.	Increase enrollment of Bay Aging patients.	100.	Well Sky or newly purchased software.	Well Sky or newly purchased software	.Daily, Weekly, Monthly, Quarterly, Yearly.
Increase attendance hours at both Adult Day Care Centers (ADB).	Delivery of services to clients that promote independent community living, socialization, and health.	Increase attendance hours by 10% which will increase service hours by 150 hours per month at Gloucester ADB and 86 hours per month at Essex ADB.	Attendance records.	Attendance records, monthly billing reports.	Monthly.
Increase home care service hours.	Delivery of care (ADL's and homemaker services) to clients that promote independent community living, socialization, and health to avoid institutional placement and/or hospitalization.	Increase service hours by 50% to private pay clients. Continue to provide service hours in accordance with available Department for Aging and Rehabilitative Services funding.	Monthly billing records.	Monthly billing records.	Monthly.
Attend one or more chamber events each year.	Promote the Veteran Directed Care Program in the community.	One.	Sign-out sheet.	Sign-out sheet.	As needed.
Attend one or more program meetings per year which are sponsored by a veteran service organization.	Promote the veteran specific services Bay Aging offers.	One.	Program files.	Materials received about meeting and at the meeting.	As needed.