
NEW YORK STATEWIDE
SENIOR ACTION COUNCIL

Strategic Plan: 2017 - 2020

Adopted: October 2017

OVERVIEW



INTRO

The following StateWide leaders were present for the Strategic Planning Session:

TBA

The following StateWide Staff Members also participated in the Strategic Planning Session:

Maria Alvarez, *Executive Director*

Gail Myers, *Deputy Director*

Long-Range Planning Report Contents

This report is composed of the following sections:

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- Focus Points, Draft Goals & Strategies
- Where Do We Go From Here?
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A BRIEF HISTORY OF STATEWIDE

New York StateWide Senior Action Council (StateWide) is a grassroots membership non-profit organization made up of individual senior citizens and senior citizen clubs from all parts of New York State. StateWide was organized in 1972 from War on Poverty funds with the goal of developing a statewide organization of older New Yorkers who could advocate for their interests and needs regarding services, programs and policies effecting older persons. StateWide's unique history and role has been to focus on the needs of the low-income and minority seniors.

With other advocacy organizations and service providers across the nation, StateWide has helped build a very successful and cost-effective aging network over the past four decades. This has reduced the number of senior citizens living in poverty by over 50%, has allowed seniors to remain in their communities, has dramatically increased quality of life, and has avoided costly institutionalization as the only alternative for long-term care.

Throughout the 1970's and 80's, StateWide has worked on a number of issues and provided trainings and educational workshops throughout the state. For example, while working on energy issues in those years, StateWide also educated seniors about the dangers of hypothermia. In the 1980's, StateWide played a key role in advocating for laws ending mandatory retirement and enacting the Elderly Pharmaceutical Insurance Coverage (EPIC) program.

StateWide also began operating its Patient's Rights Helpline to assist consumers with questions and complaints about hospital patients' rights and other health issues. StateWide continues to be at the forefront of the debate to ensure strong protections in hospitals, nursing homes, and other community based health care delivery systems.

Recently, StateWide has focused on universal access to health care and prescription drug costs, protecting Social Security and Medicare, increasing funding for important community-based services and concerns related to managed care as thousands of older New Yorkers sign up each month with health maintenance organizations (HMOs). Presentations are made in various regions of the state on these issues and on changes in the Medicare program and questions seniors need to ask before switching from traditional fee-for-service to join a Medicare HMO or other alternative. The association is also currently focused on promoting the economic security of seniors.

WHERE'S STATEWIDE? WHAT IS THE CURRENT STATE OF THE ASSOCIATION?

The work of the Strategic Planning Session began with a simple “taking of the pulse” of StateWide leaders and supporters. The group was asked to share its initial thoughts regarding the current state of the affiliate. This was a “gut reaction” exercise.

The group offered the following:

StateWide...

- Is Consumer Directed / Governed
- Has a Focus on Advocacy
- Is *RELEVANT!* There is a need/role for StateWide.
- Is in transition/at crossroads/going through generational transition.
- Is adapting to a changing environment – in terms of its organization, the economy and the nature of who it serves.
- Is open to everyone/ membership for 50+.
- Is the *only* statewide grassroots organization for NYS seniors.
- Serves as a clearinghouse for important information; go-to resource.
- Is committed to enabling seniors to live in communities *they choose* to live in.
- Is full of wonderful people and ideas.
- Is led by a dedicated group of leaders; has strong staff leadership.
- Is blessed with a highly dedicated cadre of volunteers
- Improves the quality of life of seniors and their families in communities across the state.
- Is “connecting the dots” to all senior resources within NYS.
- Has a proven track record; was instrumental in getting EPIC & Medicare Observation Status
- Is known and respected by NYS legislators, State Office of the Aging and other agencies.
- Fights on the local, state and federal levels for senior issues.
- Works well in coalition with other groups.
- Is still working to achieve full geographic and demographic coverage for the association.

Most of these statements or descriptions illustrate an association that is taking a serious look at itself and is dealing with some serious challenges and issues.

The comments also show that participants have an idea as to the areas that need to be addressed in the coming years.

STATEWIDE STRATEGIC PLANNING SURVEY COMPILATION

Survey Statistics

Total # of Respondents – 49

(Represents 47% response rate of 105 paid members for 2011; 19% if you also include lifetime members. Either way, response rate is well-above national average for such surveys.)

Average # of years involved with senior advocacy – 17.7 years

Chapter/Community – The largest number of respondents came from NYC/Metro (18%), North Country (14%) and Lower Hudson Valley (12%). Western New York and Long Island respondents were fewest – each accounting for less than 1% of survey total.

Overall Sampling – Based on all factors, StateWide Leadership can feel comfortable making decisions based on information obtained from survey as the overall sampling amply represents the membership.

Survey Narrative Responses

Top challenges facing StateWide?

- Funding! Finding as many sources of funding/revenue as possible to promote and support the cause
- Increasing membership size; reaching more seniors across to state to gain power
- Increase exposure/media access
- EPIC funding; local aging services for seniors; fight cuts to Social Security, Medicare and Medicaid
- Find partners/allies in order to advance legislative agenda

Top challenges facing senior citizens of New York State

- Growing demographic
- Economic security in these uncertain times and beyond; rising costs of living, food, fuel, etc.
- Affordable housing; ability to have affordable rent and receive in-home care
- Need for better healthcare system; affordable healthcare and prescription drugs
- Closure of senior centers and nursing homes
- Threats to safety net programs and other programs benefits for seniors and families

Top things members need from StateWide

- **THIRST FOR MORE KNOWLEDGE & INFORMATION**
Almost every respondent stated such things as “need for more information,” “regular updates,” “must know what’s going on and how to react.”
- Active representation and lobbying – in both Albany and Washington; give them the tools so they can help change the perceptions on senior issues
- Training/information at conferences and meetings all around the state; with focus on advocacy, senior rights, legislative agenda and practical tips on filling out applications/paperwork for state and federal program – as well as opportunity for members to offer comments/suggestions to StateWide leaders
- Basic Information Tips on how to recruit new members and begin new chapters

Other useful information from survey responses

Some practical suggestions made multiple times concerning StateWide operations.

These include:

- Newsletters and updates; “50% of seniors do not have computers.”
- E-newsletters, Facebook, Website
- 1-800 # Help Line – “with a person answering again;” no answering machine
- Continue training for members across state. i.e. advocacy – “How to advocate for yourself and seniors across NYS”
- Include option to pay lifetime membership in 3 payments within 90 days (1/3 for 3 months) on membership form

STATEWIDE

CORE IDEOLOGY & ENVISIONED FUTURE

Core ideology describes an organization's consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: mission – the organization's reason for being; and core values – essential and enduring principles that guide an organization. Envisioned future conveys a concrete, but yet unrealized, vision for the organization. It consists of a clear and compelling catalyst that serves as a focal point for effort. Based on the strategic planning deliberations, the following is the core ideology and envisioned future for StateWide:

CORE IDEOLOGY

Mission: The New York StateWide Senior Action Council works to achieve dignity, well-being and security for all older persons in New York State. To these ends, StateWide members engage in educational efforts, services and grassroots advocacy at the community, state and national levels.

Core Values:

1. Integrity and honesty
2. Credibility – knowledgeable on senior issues
3. Respect
4. Open dialogue
5. Collegiality
6. Stakeholder Equality – equal opportunity for input

ENVISIONED FUTURE

To become *the* influential force of senior advocacy in an association that:

- Is financially strong.
- Is a legislative powerhouse.
- Is a leader in information, networking and programming.
- Is strategically partnered with others to be the “go to” resource.
- Is prepared for opportunities for more inclusive participation in the association.

And in doing so, StateWide can help achieve the vision of a State of New York in which all older persons fully enjoy all the rights proclaimed in the Universal Declaration of Human Rights.

STATEWIDE STRATEGIC PRINCIPLES

Strategic principles are concrete statements grounded in the association's core values that give guidance about direction and provide parameters for action. They will help StateWide assess if an opportunity fits within its service niche.

StateWide Strategic Principles are:

1. Continue honing existing programs and further develop programs that will be of use and interest to seniors and may be of interest to other stakeholders, and that are likely to generate revenue or demonstrate a reasonable benefit.
2. Ensure that the needs of our members and their communities are successfully addressed.
3. Execute strategies required to sustain critical mass needed to be the unified voice for the cause of senior rights.
4. Anticipate and respond to the evolving senior issues and political environment in New York State and the United States
5. Pursue opportunities that leverage member/staff capabilities and/or partnerships wherever possible.
6. Prioritize new and existing opportunities for the association.

GOALS & STRATEGIES

Outcome-oriented statements represent what will constitute success to StateWide in a 1-3 year timeframe in each of its major areas of focus. The achievement of each goal will allow StateWide to realize progress toward achievement of its Envisioned Future. Each of the major goals must be achieved over a 1-3 year period in order to move StateWide toward the desired Envisioned Future.

1. GOAL: STRUCTURE, LEADERSHIP, VOLUNTEER & MEMBER PARTICIPATION

Ensure StateWide's governance and organizational structure is prepared for the 21st century with expanded leadership and strengthened membership throughout the state in order to support its core mission.

Objectives

1. Support activities toward the new structure of county chapters and regional councils
2. Increase membership across-the-board
3. Expand the number of volunteer leaders at all levels (Board of Directors, Chapters, committees, and projects)
4. Create effective action plans and increase follow-through on all StateWide projects and initiatives
5. Create consistent levels of quality and activity across the state - consistent grassroots organizing

Strategies

In 2017-2021:

1. Conduct a full committee review, identifying a standing and ad hoc committees, their current status (chair, identifiable embers, mission, projects, etc.)
2. Conduct a workshop at the Convention on how to reach out to new members, sharing successful local strategies and improving coordinated efforts throughout the state.
3. Provide training to Board members and other members to enable them to promote NYSW's mission
4. Establish chapters in under-represented areas of the state
5. Evaluate membership retention and involvement
6. Continue Board and committee efforts to review and identify all possible candidates who could bring their talents to StateWide; expand current leadership "hit list" and begin reaching out/ recruiting these possible future leaders and involve in committee/ project work.
7. Establish processes to evaluate all aspects of the organization, including effectiveness.
8. Review/expand leadership guide/manual that will provide useful information to all current and potential leaders (Board, staff, committee and project chairs)
9. Establish a volunteer recruitment and retention program that identifies all possible volunteers, sends out timely and attractive electronic and hard copy literature, and has human follow-up.
10. Continue establishment of new Chapters.

2. GOAL: INFORMATION AND COMMUNICATION

StateWide will be the authority and clearinghouse for expert information on older adult issues that decision makers, membership organizations, partners, other older adults and the general public will need to support their work and further advocacy for older adults at all levels of government

Objectives

1. Become a leading source of information on issues affecting older persons.
2. Increase resources to acquire and disseminate information.
3. Increase the ability to recognize emerging issues

Strategies

In 2017-2020:

1. Increase StateWide's ability to communicate emerging issues and act on them in a timely, pro-active manner.
2. Identify and assemble the resources needed by leaders, volunteers and members; this information will serve as the "StateWide Toolkit"
3. Create an "operations calendar" for major issues to develop a tactical communications plan and set precise times for conveying our information in order to achieve maximum impact.
4. Use full name "New York StateWide Senior Action Council" whenever possible.
5. Train membership and staff in the use of media and technological tools – Listserv, Bulletin Board, Network
6. Develop and implement means of communicating quickly with members lacking e-access.
7. Maintain a "Speakers Bureau"

8. Continue to expand our web presence and update content periodically to serve as the first-line clearinghouse of information.
9. Conduct and publicize public surveys on issues affecting older persons.
10. Create a StateWide public relations video describing the organization and using the member interviews with the purpose of recruiting new members.

3. GOAL: PROGRAMMING

StateWide will continue to be recognized as a preeminent source of services and support to senior citizens and their families and other service providers.

Objectives

1. Increase opportunities for education/information/networking around the state
2. Increase member and community participation in all programs and events.
3. Expand services to seniors/members through effective partnerships with organizations with similar interests/ focus

Strategies

2017-2020:

1. Develop "soft topic" programs that can be used at local senior clubs and will promote StateWide
2. Use the annual convention as a platform for membership recruitment and greater involvement
3. Create and integrate into events around topics are of interest to all age groups, e.g. the environment, healthcare, economic security, etc...
4. Develop media-based offerings that can help bring StateWide to less densely populated areas or during the winter, i.e. community access television, pre-recorded presentations, etc.
5. Develop programs with organizations with similar interests/ focus, coordinating with local branches of the state Office for the Aging.
6. Webinars
7. Continuing Training Education (CTE)

4. GOAL: ADVOCACY & IMAGE

StateWide will successfully advocate and/or educate the public, elected leaders and legislative bodies, and other interested parties as to the changing demographics and needs of seniors across New York State.

Objectives

1. Increase the level of communication and outreach to government leaders on the local, state and federal levels
2. Increase visibility and become increasingly known as the forum for debate and reliable information on senior policy issues
3. Increase perception of StateWide by policy makers as the preeminent voice of the cause in New York State.
4. Highlight the positive role of grassroots lobbying as a legitimate educational activity.

Strategies

In 2017-2020:

1. Maintain a timely, comprehensive and informative Bill Tracker
2. Schedule visits to legislators in their district offices.
3. Develop awareness of StateWide as an organization and its advocacy and service messages through:
 - a. Publicity
 - b. media coverage
 - c. letters to the editor
 - d. facebook
 - e. local Office for the Aging newsletters
 - f. Cultivate relationships with local press and reporters
4. Establish annual dates for state and federal budget advocacy days.
5. Grassroots Advocacy Training @ Convention
6. Gather Story Telling & Anecdotal Evidence supporting our advocacy issues

WHERE DO WE GO FROM HERE?

The information and ideas discussed at the Strategic Planning Session has been synthesized and serves as a reference in helping the leaders in setting StateWide's specific strategies for the upcoming year and beyond.

It is important to remember that in the future, StateWide's Strategic Plan will evolve to meet the needs of a constantly changing cause. Therefore, underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time.

The StateWide Strategic Plan should be a "living document." Its framework should serve as the basis of every Board of Directors, committee and staff meeting. It is a "roadmap" for the future.

After leadership and staff review, we will include a Gantt chart laying out the timeline for action, etc. This will offer a helpful visual for all those using the report. Example:

Task #	Description	Duration (months)											
		1	2	3	4	5	6	7	8	9	10	11	12
1a	Business Plan Development												
	Market research												
	Draft plan												
	Final plan												
1b	Strategic Research Plan												
	Evaluate existing work												
	Draft plan												
	Final plan												
2	NY-BEST Testing Capabilities												
	Identify need & opportunities												
	Testing Capabilities plan												
	Fund plan												
	Appropriations request												
	Government proposals												
	Company market development												
3	Networking, referrals and contacts												
	Initial meetings with all members												
	Market research on target apps.												
	Cultivate relationships												
	Conference & Symposia												
4	Outreach and Marketing												
	Market research												
	Market development												
	Website upgrade												
	Outreach												
5	Policies and Agreements												
	Testing agreement												
	cooperative research model												
6	Measuring Success												
	Draft metrics												
	Final metrics												

FINAL NOTE

Thank you to all who participated in the Strategic Planning Session and subsequent follow-up. The focus and energy shared during the session are a testament to your desire and hope to make New York StateWide Senior Action Council a stronger and meaningful organization advocating for, protecting, and advancing the rights of senior citizens across New York State.

APPENDIX/SUPPORTING MATERIAL

The following resources were utilized in the work of the Strategic Planning process and are useful in understanding the mission, structure and governance of the New York StateWide Senior Action Council. These resources should continue to be used as reference material for future planning:

StateWide Vision & Mission Statements (May 30, 2011)

United Nations Universal Declaration of Human Rights

StateWide Strategic Planning Survey

StateWide By-Laws

StateWide Chapter Map

