
NEW YORK STATEWIDE SENIOR ACTION COUNCIL

Strategic Plan: 2021 - 2024

Adopted: June - 2020

OVERVIEW

INTRODUCTION

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

Mario Henry - President, Board of Directors

Helen Edelstein - Board Member, Ulster County

Kathlene Lyman - Alternate Board Member, Saratoga Chapter

Lowell Green - President, NYC Chapter, Board Member

Jay Cee Holden - Treasurer, NYC Chapter, former Board Member

Helen Westmoreland - Member, Western NY Chapter

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

Maria Alvarez, Executive Director

LONG-RANGE PLANNING REPORT CONTENTS

This report is composed of the following sections:

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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 **five** 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, & has avoided costly institutionalization as the only alternative for long-term care.

Throughout the 1970's and 80's, StateWide 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.

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 elder economic security, the home health care crisis, Medicare fraud, safe staffing ratios, and hospital and nursing home strategies such as observation status law.

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.

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

NEW YORK SENIORS TODAY

The Board of Directors met in virtual session on March 31, 2020 and April 1, 2020. The Board decided that a committee should be formed to write a Strategic Plan for 2021 -2024.

The president of each chapter was to alert their chapter members of the need for volunteers to serve on the committee. In the weeks that followed, six StateWide members volunteered to join the committee: Helen Edelstein, Kathlene Lyman, Lowell Green, Jay Cee Holden, Mario C. Henry, and Helen Westmoreland.

The committee met in virtual session on May 1, 2020 and May 8, 2020. Kathlene Lyman volunteered to act as secretary. Maria Alvarez, Executive Director of StateWide joined the meeting.

The committee agreed to continue with the previous plan's Goals and Strategies and concentrate on revising the strategies. Additional changes were made to other parts of the previous plan. Chapter presidents were given the opportunity to give further input.

The committee submitted the Strategic Plan for 2021 – 2024 at the Board of Director's meeting on June 16, 2020 and June 17, 2020 at which time it was approved.

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 the 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
- Access
- Increasing engagement in local chapters

Top challenges facing senior citizens of New York State:

- Economic, language, and religious barriers exist
- Loneliness
- Access to home care
- Lack of emergency systems in the communities
- Growing demographic

Top Challenges facing senior citizens of NYS (continued)

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

Top things members need from StateWide:

- Thirst for more knowledge and information - (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 programs – as well as the opportunity for members to offer comments/suggestions to StateWide leaders
- Basic Information Tips on how to recruit new members and begin new chapters

Some practical suggestions made concerning StateWide operations:

- Newsletters and updates; “50% of seniors do not have computers.”
- Some seniors do not have answering machines
- E-newsletters, Facebook, Website, Twitter, Video Instruction, Zoom meetings, Telephone Teach-ins
- 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”
- How to avoid fraud
- 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 continue being *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

Given the increase in the senior population, StateWide's governance and organizational structure is continuing to prepare for the future with expanded leadership and strengthened membership throughout the state in order to support its core mission.

Objectives

1. Support activities toward the 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 2021-2024:

1. Conduct a full committee review, identifying a standing and ad hoc committees, and their current status (chair, identifiable members, mission, projects, etc.)
2. Continue to hold an annual convention to share ideas and inform interested parties about StateWide
3. Provide training to Board members and other members to enable them to promote NYSW's mission
4. Continue to establish new chapters especially in under-represented areas of the state
5. Continue to evaluate membership retention and involvement

6. Continue Board and committee efforts to review and identify all possible leaders who could bring their talents to StateWide; expand current leadership and encourage these possible future leaders to become involved in committee/project work
7. Continue the processes of evaluating all aspects of the organization, including effectiveness
8. Continue to review/expand leadership materials that will provide useful information (roster, contact, bylaws, etc.) to all current and potential leaders (Board, staff, committee and project chairs)
9. Continue 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

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. Continue as 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 (Goal 2)

In 2021-2024:

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 be included in the "StateWide Toolkit"s.
3. Continue to implement 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 the 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, Twitter, Facebook, etc.
6. Develop and implement a means of communicating quickly with members lacking e-access
7. Educate seniors without e-access how to use access technology resources in their community
8. Maintain a “Speakers Bureau”
9. Continue to expand our web presence and update content periodically to serve as the first-line clearinghouse of information
10. Continue to evaluate the services we provide
11. Update the 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. Continue to increase opportunities for education/information/networking around the state
2. Continue to increase member and community participation in all programs and events
3. Continue to expand services to seniors/members through effective partnerships with organizations with similar interests/ focus

Strategies

2021-2024:

1. Develop and implement programs that can be used with local senior organizations that will promote StateWide
2. Continue to use the annual convention as a platform for membership recruitment and greater involvement

3. Develop and implement programs in collaboration with groups such as the Offices for the Aging, intergenerational, or multicultural groups around common issues.
Ex. environment, healthcare, economic security
4. Continue to 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, webinars, etc.

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. Continue to increase the level of communication and outreach to government leaders on the local, state and federal levels
2. Continue to increase visibility and become increasingly known as *the* source of reliable information on senior policy issues
3. Continue to increase the perception of StateWide by policy makers as the preeminent voice of the senior causes in New York State
4. Continue to highlight the positive role of grassroots lobbying as a legitimate educational activity

Strategies

In 2021 - 2024:

1. Maintain a timely, comprehensive and informative Bill Tracker
2. Schedule visits to legislators in their district offices
3. Schedule an annual grass roots day in Albany
4. Continue to 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. Cultivation of relationships with local press and reporters

5. Establish annual dates for state and federal budget advocacy days
6. Grassroots Advocacy Training @ Convention
7. Gather Story Telling & Anecdotal Evidence supporting StateWide's advocacy issues

5. GOAL: BUILDING FINANCIAL STRENGTH

Expand StateWide's financial resources in order to further support its mission

Objectives

1. Ensure StateWide's financial future through sound financial management and increased revenue
2. Augment and diversify revenue sources beyond state funding

Strategies:

In 2021 - 2024:

1. Educate board members about the importance of the Kryzak Fund (increase awareness of Rose Kryzak Fund)
2. Provide new members with a Tool Kit, give-a-ways, and "Welcome Letter"
3. Local Chapters will reach out to new members especially if they have signed up through the main office.
4. Continue to develop fundraising plans. Ex. Memorial giving, 50th anniversary
5. Continue to advocate to state and local government officials the value of StateWide to the community, its quality of life and economic future
6. Build additional revenue streams through increased marketing and sponsorship efforts; publish marketing packet that showcases both annual and event-specific sponsorship opportunities
7. Actively promote StateWide's 501©3 public charity designation by the IRS and its NYS public charity / tax exempt status to solicit donations and other sources of funding
8. Continue to research and pursue additional grant opportunities at the national, statewide and regional levels

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.

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)

StateWide Chapter Map

