

FEBRUARY 2024

STRATEGIC PLAN

New York StateWide Senior Action Council



STATE  WIDE
New York StateWide Senior Action Council, Inc
275 State Street, Albany, NY 12210 • 800-333-4374 • Fax 518-436-7642
www.nysenior.org

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A message from our Leaders

Helen Edelstein, Board President



We are pleased to introduce New York StateWide Senior Action Council's Strategic Plan for 2024-2027. The strategic priorities detailed in this plan will guide the organization as we move forward in meeting our mission and actualizing our vision. We look forward to exciting, productive years ahead as we partner with all our stakeholders in advocating, educating and serving seniors and their families throughout New York State.

María Alvarez, Executive Director



In developing this strategic plan, we have conducted a thorough analysis of our internal capabilities and external environment. We have engaged with stakeholders, including our membership, partners, and personnel to understand their needs and expectations.

The strategic plan is structured around five key goals, which are aligned with our mission and vision to improve the quality of life of New York State's elders

and their families. These goals are supported by specific objectives and strategies that will guide our actions & decision-making. Our strategic plan is a living document that will be reviewed and updated regularly to ensure that we remain responsive to changing circumstances and continue to deliver value to our stakeholders.

We are excited about the opportunities that lie ahead and are confident that this strategic plan will position us for long-term success!

About

New York StateWide Senior Action Council



New York StateWide Senior Action Council was founded through the Federal Government's War on Poverty Initiative. These funds were made available in order to combat perceptible inequalities across the country, which were directly attributable to the lack of resources in many communities. Older Americans, living on fixed incomes, and just beginning to benefit from programs such as Medicare, were seen as being at risk.

True to the brand of fighting spirit that one can only find in New York, seniors organized across the state and went on to form New York StateWide Senior Action Council in 1972. Under our first director, Robert O'Connell, StateWide was – and still is – the only grassroots senior advocacy program that brings seniors together across our state for self empowerment and to improve the quality of life for older New Yorkers and their families.

Over the years, there have been great battles and campaigns – some won (EPIC, Patients Bill of Rights), some lost (Medicare Modernization Act of 2006), and some that have yet to be resolved (Universal Healthcare). But one thing that remains a constant is our membership's commitment to our mission and organization.

Seniors are living longer, baby boomers are aging in, and New York State is graying and we need to ensure that the StateWide movement not only continues, but is strengthened. We will be conducting a campaign for future generations.

TIMELINE

1972

StateWide forms at a meeting in Glens Falls of senior leaders from around the state, offices established in New York City, Syracuse and Rochester with Robert O'Donnell, Executive Director.



1986

StateWide plays a major role in finally getting the Elderly Pharmaceutical Insurance Coverage Program (EPIC) passed after several rallies including one led by President Rose Kryzak outside the office of Governor Mario Cuomo.



1987

Medicare Patients Rights Hotline established; StateWide works extensively on regulations protecting consumers regarding hospital discharge policies.



1993

StateWide plays a role with children's organizations in the passage of Child Health Plus.



1994

StateWide members take part in White House Conference on Aging; StateWide plays a leadership role in passing Pre-Need Funeral Protections.



TIMELINE

1995

StateWide urges action after hundreds of seniors die in heatwave in Chicago; StateWide joins fight against Medicare cuts proposed by Newt Gingrich.



1996

StateWide works for reforms of HMOs and passage of managed care bill of rights.



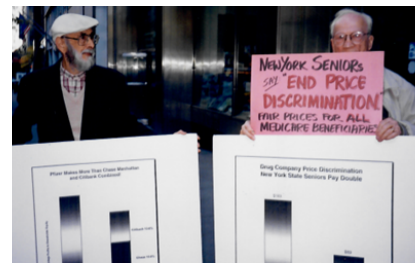
1997

StateWide plays a role in urging the Attorney General to become more active in health care consumer protections.



1999

StateWide plays a key role in helping to expand the EPIC Program's income eligibility limits.



2000

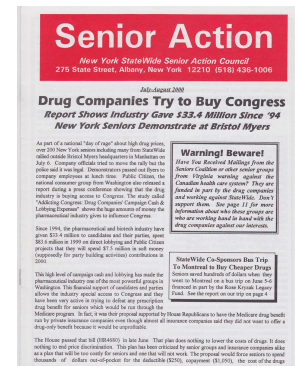
StateWide and Coalition Partners helped secure almost \$6 million in additional funding for SNAP, CSE, CSI, EISEP, LTC ombuds Program, Social Model Adult Day Care and Senior Center Renovation and Construction. StateWide helped to urge the Senate to hold hearings on the high cost of prescriptions.



TIMELINE

2005

StateWide is awarded a federal grant to conduct outreach and education on the new Medicare Part D drug benefit, and its interface with EPIC. The project focuses on establishing monitoring teams throughout the state, providing Helpline support to Seniors and community members, and meeting directly with seniors.



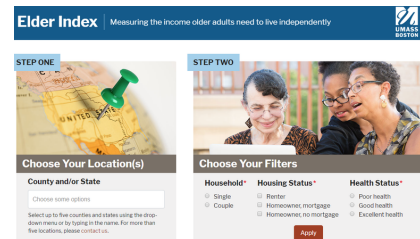
2008

StateWide participates in the Single Payer NY Movement ensuring accessible and affordable health care for all New York State residents



2009

StateWide is named lead organization in the roll out of the New York State Elder Economic Security Index in conjunction with WOW and the U-MASS.



2011

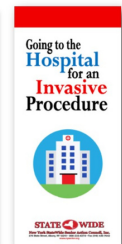
StateWide and coalition partners successfully advocated to restore budget funding for senior centers through Title XX.

STATE BUDGET REPORT:
Huge Victory for Seniors - Title XX Funding Fully Restored



2012

StateWide receives a grant from Atlantic Philanthropies to establish our Patient Advocates Program.



2013

StateWide members successfully attained the NYS Observation Status Notification Law, the first in the country that went on to become federal law.



TIMELINE

2016

StateWide organizes the NYS Home Care Crisis Campaign to bring attention to the growing workforce shortage in the field of home health care in New York State.



2018

StateWide received the Senior Medicare Patrol grant from the Administration for Community Living (ACL) to help prevent Medicare and Medicaid Fraud among seniors in New York State.



2020

StateWide, with a grant from the Health Foundation for Western & Central New York, established the CNY Health Task Force to help identify, address, and solve problems in health care services and delivery across the Central New York Region.



2021

StateWide, along with 2-1-1, the library system and our local partners pioneers a telehealth access initiative offering Wi-Fi access at community sites throughout Central New York.



2022

StateWide celebrates 50 years of success at our in-person 2022 Convention and Gala on September 12-14 in Saratoga Springs.



2023

StateWide secures funding for the SMP State Project Grant, covering the project period from 2023 to 2028. Funding granted by the Department of Health and Human Services, Administration for Community Living.



Overview

On June 12th and 13th of 2023, the New York StateWide Senior Action Council (StateWide) conducted a Strategic Planning Session at the Holiday Inn Express - Downtown in Albany, New York. The following StateWide leaders were present for the Strategic Planning Session:

Helen Edelstein, *President of the Board, Hudson Valley*

Eustene Corbin, *1st Vice President New York City*

Mario Henry, *Treasurer, New York City*

Vanessa Birmingham, *Assistant Treasurer Western New York*

Kathlene Lyman, *Secretary, Capital District*

Nelsa Selover, *Assistant Secretary, Finger Lakes*

The following StateWide staff members also participated in the Strategic Planning Session:

Maria Alvarez, *Executive Director*

Gail Myers, *Deputy Director*

Stefania Buta, *Strategic Plan Facilitator, Program Development Coordinator*

Mary Pritchard, *Capital District*

Michelle Rogers, *Capital District*

Robert Sinacore, *Capital District*

Richard Poplaski, *Capital District*

Susan Burns, *Finger Lakes*

Dorothy Laffoon, *Finger Lakes*

Mary Ann Hildebrandt, *Hudson Valley*

Eileen Letzeiser, *Hudson Valley*

Claire O'Brien, *Hudson Valley*

Martha Steuding, *Hudson Valley*

Evette Weeks, *New York City*

Carolyn Parker, *New York City*

Mary Degan, *North Country*

Laura Jandrews, *North Country*

Barbara McBurnie, *North Country*

Susan Schrader, *North Country*

Jacqueline Thompson, *Western New York*

The Strategic Planning Process

In creating an organization's strategic plan, the Board of Directors and the Executive Director, together, are responsible for creating a realistic plan that takes into account the organization's mission, vision, community needs and the external context in which the organization operates.

- It is the Board's responsibility to direct the strategic planning process and approve long range goals and objectives.
- It is the Executive Director's responsibility to formulate objectives and prepare performance reports on achievements of goals and objectives.

Board of Directors

On June 12 and 13, 2023, the StateWide Board of Directors convened in Albany, New York to begin the process of developing the organization's Strategic Plan for 2024-2027. The purpose of the sessions was to provide a forum for the Board of Directors to consider these questions as we move into the second half of our first century:

- **Who are we?**
- **Where are we now?**
- **Where do we want to be?**
- **How do we get there?**



Mission, Vision, & Values

As a first step in developing the 2024-2027 Strategic Plan, the Board examined StateWide's purpose and focus, its aspirational ideal, and the principles to consistently abide by. As a result of this process, the following Mission, Vision and Values statements were adopted by the Board.



MISSION

Our purpose & focus



VISION

Our aspirational ideal



VALUES

The principles we
consistently abide by

Our Vision

To enhance the quality of life for all seniors in New York State.

Our Mission

As a consumer directed and governed grassroots organization, New York StateWide Senior Action Council works as the trusted voice for all seniors through advocacy, education, and services.

Our Values

- Integrity and honesty
- Ethical
- Respectful
- Inclusive
- Knowledgeable
- Trustworthy
- Reliable
- Compassionate
- Informative

Strengths

The Board reviewed the organization's current internal and external environments. StateWide's strengths and challenges were discussed, as well as the ways in which external forces and trends may be reframed as opportunities.

Strengths:

- Consumer directed
- Longevity – 50 years
- Mission driven, action focused, reform-oriented
- Strong leadership
- Engaged board
- Knowledgeable, dedicated staff
- Seasoned advocates, relationships with legislators
- Network of community partners & organizations
- Diverse and active membership and volunteers
- Unbiased trusted information (i.e. educational programming, helplines, Senior Medicare Patrol)



Challenges

INTERNAL

01 Chapter Development, coordination

02 Fundraising

03 Intergenerational involvement

04 Member Recruitment

05 Visibility and Marketing

EXTERNAL

01 Affordable Housing

02 Economic Security

03 Home Care Crisis & the Healthcare Workforce Shortage

04 Mental Health and Isolation

05 Rapid Growth of Older Population

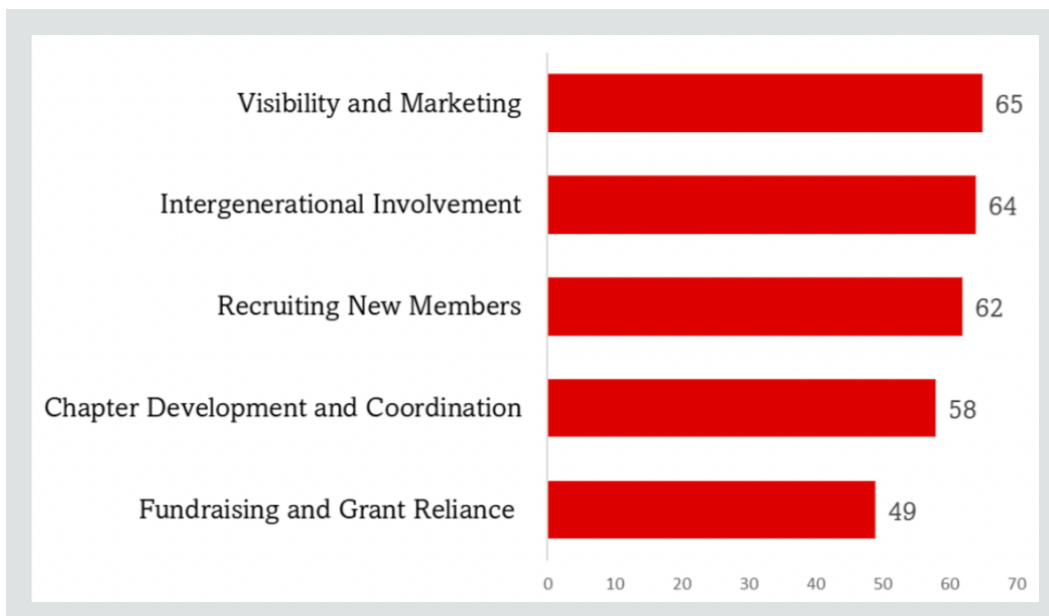
Stakeholders Input

To ensure that all stakeholders had an opportunity to provide input into the planning process, a survey tool was created and distributed to members, clients, and community partners. The survey was distributed digitally during the month of July. Of the 116 respondents to the survey, 75% of the respondents were members and 25% were non members.

Important issues facing seniors

Declining healthcare and workforce shortage	Economic Security	Isolation and Mental Health
Affordable Housing	Digital Literacy	Environmental Disasters
Access to Affordable Transportation, Healthy Food	Affordable Healthcare and Prescription Drugs	Long term care Affordability & Options
Climate Change	Fraud and Abuse	Home Care Crisis
Nursing Home Minimum Staffing	Elder Abuse and Neglect	Safety in our homes and communities

Organizational challenges facing StateWide



Strategic Planning Committee

To process all the data collected from the Board's planning sessions, the stakeholders' surveys and the staff's input, a Strategic Planning Committee was convened in July. The committee included a member of the Board (Helen Edelstein), a member of the staff (Stefania Buta) and the Executive Director (Maria Alvarez).

During the months of July and August, the committee met to:

1. formulate strategic priorities that reflect the aspirations of the Board, the staff, members and other stakeholders
2. develop a Strategic Action Plan (goals, objectives, timelines, outcomes) to achieve the strategic priorities.

In September, 2023, the Strategic Priorities and Action Plan were presented to the Board of Directors for their review. The Board voted to approve New York StateWide Senior Action Council's 2024-2027 Strategic Plan.

Next Steps

We are confident that these strategic priorities will serve to enhance our commitment to all our stakeholders, strengthen our organization and support its growth. Our next steps include forming committees that will focus on strategic priorities identified by the Board to be carried out by the organization.

2024-2027 Strategic Plan



Governance

Enhance the Board's ability to support StateWide's mission.



Finance

Ensure current and future financial stability by diversifying funding sources.



Membership

Recruit and develop StateWide's membership and chapters.



Programming

Gather information from members, community, & partners to guide programming and services.



Advocacy

Encourage proactive engagement of members and community partners in StateWide's legislative agenda.