



agewellvt.org  
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September 7, 2024

Town of Richmond  
Attn: Josh Arneson  
PO Box 285  
Richmond, VT 05477



Dear Josh,

Since 1974, Age Well has provided support and services to Richmond's aging population, helping them to stay independent and remain healthy at home, where most wish to be. Whether it's Meals on Wheels, in-home care coordination, caregiver support, or wellness programs, we know that health can happen at home and are here to enhance and improve the quality of life for Colchester residents.

Age Well continues to see a rise in those needing support in Richmond and beyond and as our aging population continues to grow, there will be even more demand. During this fiscal year alone, between October 1, 2023 and July 31, 2024, we have provided services valued at over **\$82,700 to 142 Richmond residents**. As a nonprofit, these services are provided at no charge, and with your support, we will continue to ensure that our aging neighbors receive the support they have come to rely upon.

We are writing to request continued support from the Town of Richmond in the amount of **\$3,000.00**. Your partnership ensures that our vast array of supports, including; care & service coordination, Meals on Wheels, Grab & Go meals, community meals, wellness programs, social activities, transportation services, expertise on Medicare, insurance, long and short-term care options, and the Helpline will continue to be available to residents in need.

If there are any questions regarding our programs or services, please do not hesitate to contact me. Thank you for your consideration and past support.

Sincerely,

Emma Kaplan, Development & Communications Associate

BOARD OF DIRECTORS:

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(Board President)

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# Strategic Plan

## FY 2023 – FY 2025

(Year 1: FY 2023 ~ October 1, 2022- September 30, 2023)

(Year 2: FY 2024~ October 1, 2023 – September 30, 2024)

(Year 3: FY 2025~ October 1, 2024- September 30, 2025)

**Version: June 27, 2022 (1), July 27, 2022(2), August 28-2022 (3) FINAL**

Approved by Age Well’s Board of Directors **September 22, 2022**

*Proprietary Information*

### **Strategic Planning Process Overview:**

In May of 2022, Age Well undertook a comprehensive strategic planning process. This process directly involved the Board of Directors and Leadership Team with input from staff, volunteers, and community members.

The leadership team of Age Well provided an extensive review of population projections, demographic shifts, operational statistics, external forces, financial data, including a comprehensive three- year financial model, national benchmarks; community needs assessment data and future health care and technology trends. We reviewed the needs of future generations in order to understand how innovation will be part of our work.

The assessment showed that our aging population in Vermont is growing rapidly, with the number of people over the age of 65 projected to increase by 16% by 2030. This mirrors national trends. In addition, we know that Vermont itself has the second lowest birthrate in the nation, which is declining, a trend we see reflected in our service areas, and that in the next 15 years the number of older adults over the age of 65 will outnumber those young adults aged 18 years of age or younger. Vermont is also the second least diverse state in the nation overall, with only 2.5% of our aging population identifying as BIPOC, mixed race, First Nation or Asian American (census.gov). By 2030 there will be 1.5 billion older adults globally and that will top 2 billion by 2040 (un.org) so we know that the older adult population will have a tremendous influence on the care and services we will need to provide in the future.

Opportunities include balancing our mission with the need for new growth, and revenue diversification in order to remain sustainable after COVID-19 funds sunset in 2025. Significant workforce challenges and inflation post pandemic are creating financial hardships in every community therefore our ability to be proactive now to manage our financial position over the next three years is paramount to our ongoing success. Sustainability models will be a top priority, including improved efficiency to support long- term operations as well as focusing on environmental sustainability and our carbon footprint. Investing in our culture of engagement and embracing diversity, equity and inclusion as principles for ongoing agency development emerges as a priority especially as we invest in our workforce. Continued work on implementing fee –for- service programming, new contracts, targeted philanthropic goals to support financial diversification was highlighted. Innovation and digital inclusion strategy will also be a key focus as we leverage technology to drive our services and results over the next three years.

Leadership took that information and developed a draft of the strategic plan. This document (will be) discussed with the Age Well Strategic Directions Committee of the Board, the full Board of Directors, the Staff, Age Well Volunteers and our Advisory Council. It (will be) was also discussed at Department Meetings, and All Staff Meetings. The input gathered on the draft was incorporated into the final document (to be) approved by the Age Well Board by September 22, 2022.

## Age Well's Mission, Vision, and Values

### Age Well's Mission

Age Well's mission is to provide the support and guidance that inspires our community to embrace aging with confidence.

### Age Well's Vision

Age Well aspires to use our Vermont experience to be a nationally recognized and collaborative leader in the aging network promoting healthy aging, independence, dignity, and personalized choice for older adults.

### Age Well's Values:

- ***Our People:*** We will promote and maintain a culture in which our employees feel their work is valued, supported, connected to purpose and inspirational. We will welcome the diversity in our employees, volunteers, clients and communities and we will be inclusive of all.
- ***Financial Strength and Long- Term Sustainability:*** We will create new means to support and maintain our financial strength, so we remain sustainable for our future. This not only includes new financial and/or network based, contracts, and fee for service programs, but also a focus on our sustainable environment, our carbon footprint and implementing tools to create efficiencies.
- ***Innovation and Digital Inclusion:*** We will advance creative digital solutions and innovations focused on managing the social determinants of health and other barriers that influence the populations we serve. We are bold, courageous, and adaptable as we advance new solutions to support our clients.
- ***Learning, Engaging and Empowering:*** We will collaborate with community partners and peers to promote and support client independence, overall population and health and wellness through quality strategies that address the social determinants of health. We will embrace and celebrate the diversity of our staff, clients, volunteers and communities through the principles of equity and inclusion.
- ***Integrity, Kindness, Generosity, and Compassion:*** We will advance our mission with integrity, kindness, generosity, and compassion. This means we will communicate openly and transparently, and we will continue to build a culture of engagement that is client centered and mission focused.

### Critical Issues & Strategic Priorities:

Based on the findings of our environmental assessments, surveys and feedback during the planning process, five Strategic Priorities will be addressed, with linkages to our Strategic Indicators and Dashboard of Outcomes.

- **Diversity in Our Workforce: “Recruit-Retain-Develop”** Age Well will respond to the needs of our staff, volunteers and client population through a fully engaged organizational culture and a mission of excellence. We are an employer of choice that will recruit and retain diverse top talent while developing leaders of the future. We celebrate and value the diversity of our staff, volunteers, clients and communities and we will be inclusive of all.
- **Finance, Sustainability and Integration:** Age Well will be sustainable and we will enhance our ability to meet the needs of our customers and communities by being agile and financially responsible. We will create long- term sustainable and targeted growth through capital development, acquisitions and diversification of our revenues. We will build a strong and integrated network of services across the state and beyond. We will enhance efficiencies, strengthen our revenue profile, and maintain a strong balance sheet. We will implement an environmental sustainability plan to reduce our carbon footprint that will support long-term growth and efficiency while caring for our environment.
- **Efficiency, Value and Operational Effectiveness:** Age Well believes that our clients are at the center of all we do. We will deliver person centered, high quality and evidence-based care and service models as a leader in our field. As we focus on the quality of our service, our positive outcomes will be evident. Our programs will advance the health and wellness of our clients to support overall population health and health reform strategies.
- **Innovation, Digital Transformation and Inclusion:** Age Well will continue to develop and invest in robust technology to support future creative innovations that will serve our clients in new ways. We will adopt cutting- edge technology and tools to help us advance our mission with efficiency in mind. We will transform our digital capability to enhance the services we provide to our clients to be inclusive and innovative.
- **Advancement and Philanthropy:** In order to fortify our revenue streams, we will invest in our development team to advance our bold philanthropic goals for Age Well.

Strategic Initiatives address each of the Critical Issues and each one assigned a priority level based on its anticipated impact. A Leadership Team member carrying primary responsibility for its implementation is assigned along with an anticipated completion date. That detail is reflected in the planning grids which begin on page 5 of this document.

### Strategic Indicators & Goals for 2023-2025

Age Well has identified a small group of critical high-level measures which serve as the Strategic Indicators of overall organizational performance. These are grouped into the categories of: People, Finance, Quality/Satisfaction, Efficiency /Value. For the FY2023-2025 Strategic Plan, we have identified specific goals for each of the Strategic Indicators that we believe we must achieve by the end of each Fiscal Year. Where applicable, we have also identified the relevant national benchmark to provide additional perspective. These measures are reported to the Board on a regular basis to facilitate the tracking of progress and organizational performance. They are included in this plan on the Dashboard of Strategic Indicators, found on page 11 of this document.

Age Well’s mission is to provide the support and guidance that inspires our community to embrace aging with confidence.

<b><i>Critical Issue 1: Our Workforce: “Recruit-Retain- Develop”</i></b>	<b><i>Strategic Initiatives: Age Well will continue to invest in and build a strong, diverse and vibrant workforce in an engaged and positive work culture. We will be strategic as we recruit, retain, and develop the best talent while developing our future leaders. We will embrace and celebrate the diversity of our communities, staff and volunteers through the advancement of principles of equity and inclusion for all. To do this, Age Well will:</i></b>	<b><i>Priority (H=High M= Med L= Low)</i></b>	<b><i>LT Member With Primary Responsibility</i></b>	<b><i>Target Date</i></b>	<b><i>Actual Completion Date</i></b>
Tasks/Tactics	Develop a robust Wages/Benefits/Compensation program for Age Well. This may include: <ul style="list-style-type: none"> <li>- Remote work/alternative work models</li> <li>- Competitive compensation reviewed on annual schedule that includes adjustments for advancement toward certain professional degrees e.g., BSW, MSW, MSN</li> <li>- Workforce wellbeing programs and benefits</li> </ul>	H	Jason, Chris	2023-2024-2024	
	Invest in Staff and Leadership Development and develop a formalized succession preparedness plan for future leadership roles at Age Well.	M	Jason	2024	
	Proactively engage in the recruitment and retention of students and interns through formalized university and college pipelines and agreements.	H	Erin, Erica, Chris/Tim	2023	
	Formalize a staff development plan for professional growth and include a tuition reimbursement model in Year 1.  Expand on current online programs to offer additional education and advancement opportunities for current staff over the three-year plan. This may include: <ul style="list-style-type: none"> <li>- Online courses (e.g., Knowledge Wave, KnowB4)</li> <li>- Boston University CADER program certifications</li> <li>- Other certification programs</li> <li>- Contracts with universities and colleges for BSW or MSW programs</li> </ul>	H	Jason/Annick/ Lisa	2023  2023-2024-2025	
	Develop a two- year plan to achieve Best Places to Work Designation.	H	Jason	2024	

	<p>Advance and implement a three-year plan to support Diversity, Equity and Inclusion in our workplace.                      This may include:</p> <ul style="list-style-type: none"> <li>- Training programs for cultural sensitivity</li> <li>- Education about Deaf, Hearing Impaired/Hard of Hearing individuals</li> <li>- Inclusive hiring practices- Employees and Board of Directors</li> <li>- Physical plant layout and ADA equipment that supports disabled or mobility impairments</li> </ul>	H	Erica/Tracey/Jason/Annick	2023-2024-2025	
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<b><u>Critical Issue 2:</u></b> <b>Finance, Sustainability and Integration</b>	<b><i>Strategic Initiatives:</i></b> Age Well will invest in programs that support long- term sustainability and financial growth, including new fee –for- service models, and broader network integrations. We will also be mindful of our environment. We will invest in renewable resources to help to reduce our carbon footprint while generating benefits for our agency. To do this, Age Well will:	<b>Priority</b> <b>(H=High</b> <b>M=Med</b> <b>L=Low)</b>	<b>LT Member</b> <b>With Primary</b> <b>Responsibility</b>	<b>Target</b> <b>Date</b>	<b>Actual</b> <b>Completion</b> <b>Date</b>
Tasks/Tactics	Develop a 3-year strategic and financial plan for an Age Well integrated and transformative Network-based model that is designed for shared savings, that results in improved efficiency and integration within the ‘aging system’. Achieve Board of Director’s approval for the Plan to Plan. The model may include affiliations with: - Area Agencies on Aging (AAA) - VASCAMP (Senior Centers) - Adult Days - Other non- profits (e.g., Transportation, Housing)	H	Jane/Amy	November 2022	
	Create a robust and inclusive implementation and communications plan specific to the Network model. Launch the plan.	H	Jane/Amy/Tracey	October 2022 - April 2023	
	Launch the Network plan and implement Year 1 of its 3-year strategic plan.	H	Jane/Amy	May 2023- May 2024	
	Implement new contracts and private pay/fee-for-service models over the next 3 years to improve revenue streams and diversification at Age Well. Contracts and grants may include: - Payers and Statewide contracts - New business lines - Nutrition/Medically Tailored Meals and Care Management programs	H	Amy/Jane	2023-2024-2025	
	Develop and implement a plan to reduce Age Well’s carbon footprint for ongoing environmental sustainability. This may include: - Advancing solar and/or EV features at our owned buildings - Efficiency Vermont investments - Leed v4 certification for O&M	M/L	Amy/Jason	2025	
	Implement year over year efficiency savings by targeting process improvements in each department. Budget for targeting savings.	H	Amy/Tim/Matt C.	2023-2024-2025	

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<b><i>Critical Issue 3:</i></b> <b>Efficiency, Value, Operational Effectiveness</b>	<b><i>Strategic Initiatives:</i></b> <i>Age Well believes that our clients are at the center of all we do. We will deliver person centered, high quality and evidence-based care and service and be a leader in our field. As we focus on quality of service, our positive outcomes will be evident. Our programs will focus on efficiency, value and operational effectiveness to advance the health outcomes of our clients. To do this, Age Well will:</i>	<b><i>Priority</i></b> <b><i>(H=High</i></b> <b><i>M=Med</i></b> <b><i>L=Low)</i></b>	<b><i>LT Member</i></b> <b><i>With Primary</i></b> <b><i>Responsibility</i></b>	<b><i>Target</i></b> <b><i>Date</i></b>	<b><i>Actual</i></b> <b><i>Completion</i></b> <b><i>Date</i></b>
Tasks/Tactics	Achieve NCQA Accreditation of Case Management for Long Term Service and Supports.	H	Erin/Jane	November 2023	
	Secure a contract with DAIL to continue providing Medicaid funded case management services for Conflict Free Case Management (strategies may include many of the below tactics). Plan to build capacity should Age Well’s client caseload increase.	H	Erin	October 2024	
	Implement at least 2 new grants, pilots or contracts per year that advance evidence-based programs or promising practices that impact the health outcomes of Age Well clients. Contracts could be with entities such as ACL, DAIL, VDH, private businesses, or Payors. Grant/Contracts should be targeted towards key issues affecting older Vermonters such as: <ul style="list-style-type: none"> <li>- Food Insecurity</li> <li>- Social Isolation</li> <li>- Disease Management</li> <li>- Intergenerational or Mentorship Programs</li> <li>- Caregiver Support</li> <li>- Transitions of Care</li> <li>- Falls Reduction</li> </ul>	H	Erin, Chris, Erica, Tracey	2023-2025	
	Seek out annual opportunities for state and national recognition for best practices and innovative programs. These opportunities could include: <ul style="list-style-type: none"> <li>- National or Local Awards</li> <li>- Presentations at National Conferences</li> </ul>	H	Erin, Chris, Erica	2023-2025	

Column A - Strategic Plan

<b><i>Critical Issue 4:</i></b> <b>Innovation, Digital Transformation and Inclusion</b>	<b><i>Strategic Initiatives:</i></b> Age Well will continue to invest in new technologies and innovations to expand our digital platform. We will focus on using technology to support our mission, the clients we serve and to advance cutting edge thinking to create new efficiency. To do this, Age Well will:	<b><i>Priority</i></b> <b>(H=High</b> <b>M=Med</b> <b>L=Low)</b>	<b><i>LT Member</i></b> <b>With Primary</b> <b>Responsibility</b>	<b><i>Target</i></b> <b>Date</b>	<b><i>Actual</i></b> <b>Completion</b> <b>Date</b>
Tasks/Tactics	Continue to develop integration strategies for technology platforms while continuing to sunset older/obsolete technology.	M	Tim	2023-2024-2025	
	Update IT Strategic plan yearly. Evaluate how to ensure all older adults in our service area have access to technology by 2025.	H	Tim	2023-2024-2025	
	Evaluate how to ensure all older adults in our service area have access to technology by 2025.	M	Tim	2025	
	- Evaluate the Peer Place documentation system, to align IT with all other AAA's. Determine if we adopt Peer Place and create an implementation plan.	H/M	Tim, Erin, Chris	Dec 2022-March 2023	
	Evaluate in-home electronic healthcare aids and digital inclusion for Age Well clients. This may include: - Telehealth - Tablets - Alexa/Siri/Google/Voice Assistants - Health/Social Robots - Pilot a program with Verizon or VT Assistive Technology Program	M	Tim, Erin, Erica	Dec 2024	
	Advance and promote technology with our community partners. This may include: Implementing devices at Senior Centers Implementing IT/Resource Kiosks with local community partners (libraries, grocery stores) Implement digital signage to share Age Well resources and information (e.g., QR codes/applications)	H	Tim/Chris/Tracey	2023-2024-2025	
	Evolve and implement our Data Management Strategy. This may include: - Implementing data driven decision making tools - Documenting clean data auditing standards Data Warehouse/Data Fabric/Data Mesh implementation	H	Tim/Matt C.	2023-2024	
	Incorporate Chat Features and Online ordering/ticket functions into our new website.	H	Tim/Chris/Tracey/Erin	2023	

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<b><i>Critical Issue 5: Advancement and Philanthropy.</i></b>	<b><i>Strategic Initiatives:</i></b> In order to fortify and diversify our revenue streams, we will invest in our Development team to advance our bold philanthropic goals for Age Well. <i>To do this, Age Well will:</i>	<b><i>Priority (H=High M=Med L=Low)</i></b>	<b><i>LT Member With Primary Responsibility</i></b>	<b><i>Target Completion Date</i></b>	<b><i>Actual Completion Date</i></b>
Tasks/Tactics	Develop a 3 year-Strategic Philanthropic Plan that includes a strategy to acquire large donors (> or =\$25k) and targeted fundraising goals each year for the next three years e.g., > or = \$1.5M by 2025. This may also include: <ul style="list-style-type: none"> <li>- Large grants and new contracts against targeted fundraising goals each year.</li> <li>- New Corporate Partnerships</li> <li>- Celebrity endorsements/Co-branding opportunities</li> <li>- Stewarding and segmenting donors to bring to higher levels of giving</li> <li>- Board and CEO leadership and defined goals for annual fundraising efforts</li> </ul>	H	Sara/Jane/Tracey	2023	
	Pursue strategic investments in staffing to include a new Development /Major Gifts /Planned- Giving organizational strategy.	H	Sara/Tracey	2023-2024	
	Explore innovative donor stewardship models and implement annual stewardship plan. This may include: <ul style="list-style-type: none"> <li>- Matching gifts through corporations,</li> <li>- Donor advised fund, gifts of stock and alternatives vehicles of giving</li> <li>- Focus on reaching a new group /generation of donors e.g., Gen Z and Millennials</li> </ul>	M	Sara/Tracey	2023-2024	
	Expand outreach strategy using multi- media content for fundraising.	H	Sara/Tracey	2023	

**Attachment A:  
Dashboard of Strategic  
Indicators**

<b>People</b>	<b>Current Data (as of September</b>	<b>Goal for 2023</b>
Employee Turnover Rate	23.5% (cumulative)	< or = 15% per year (47.2% National Average )
Volunteer Satisfaction Rate	99%	> or = 95%
Volunteer Retention Rate	96%	> or = 95 %
<b>Finance</b>	<b>Current Data (as of September 2022)</b>	<b>Goal for 2023</b>
Net Operating Margin	7.9% (July 31)	➤ Or = Budgeted Margin (1.5%)
Days Cash on Hand	50 (July 31)	➤ Or = Budgeted Days Cash (45 Days)
Number of New Contracts /Fee for Service Programs	TBD	➤ Or = to 2
Fundraising Target	845k	Meet /Exceed Budgeted Goal
<b>Quality/Satisfaction</b>	<b>Current Data (as of September 2022)</b>	<b>Goal for 2023</b>
Client MOW Satisfaction Rate > 92%	93% (average)	➤ Or = 92%
Statewide Respite Volunteer Program Meets all Goals	-	➤ Or = 90%
NCQA Certification for Care Management Achieved	-	➤ Met
Client Hospital or ED Visit Reduction in 1 year as a result of CAPABLE program	-	< or = 1 visit/Client
<b>Efficiency/Value</b>	<b>Current Data (as of September 2022)</b>	<b>Goal for 2023</b>
Aging Network Integration Advancement Meets Targets	-	➤ Met

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