



## 2010 – 2015 Strategic Plan

### Context for the Strategic Plan

OGA was established in 1979 as a statewide organization by a coalition of interested service providers, educators, researchers, and state policy makers. It was viewed by the Senior Services Division within the Department of Human Services as a major dissemination vehicle. Historically the State Unit on Aging provided considerable support to the organization. Key milestones for OGA over the years include: educational conferences, a newsletter, publication of “Profile of Aging Oregonians,” the Oregon Business and Aging Coalition, and a website. **The organization has thrived during times of support from state and county aging services and has struggled, like many professional organizations, during hard economic times.**

The world has become a very different place from the time when OGA was begun. There are a number of emerging trends that will create both challenges and opportunities for serving people as they age. **The most significant trend is that our nation and world are becoming “grayer.” This will stretch the resources available to support and care for the aging population and the organizations that serve them.** The Baby Boomer generation has been hit the hardest during the current recession, and there will be less financial capacity to support the aging process in the way most envisioned before the stock market crash of 2008. And yet, **people expect just as much or more, and we haven’t adjusted consumers’ expectations to match the new reality of diminished resources.** The fundamental question is: How will we do more with less at every level of government and organization and in response to more complex problems?

The second major challenge is the ripple effect of technological innovations in the information age. **People are over-connected today. How do you stay in touch and relevant when people are bombarded with information and options?** The role of OGA in this web of connection needs to be reviewed, re-assessed and realigned. Another major challenge is the direction of the field of aging. There are very few generalists because of the pressure to specialize and sub-specialize. This challenge is heightened when combined with the over-arching trend of membership erosion in professional organizations. If specialists are associating and networking with their counterparts and OGA does not attract and connect with these people, the organization won’t have the understanding of other fields that it needs in order to respond to complex issues.

Finally, there are the barriers of ageism and fear of aging. **It is more difficult to get professionals involved in Gerontological issues unless it is in their self-interest to do so because they tend to fear aging.** In order to serve the broad field and number of professions that aging encompasses, OGA will have to find a way to breakthrough this ageism.



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### Guidelines for Creating the Strategic Plan

The future is more uncertain than ever before. While it is important to have a vision, a short-term focus is needed so OGA can be more nimble and adaptable. Boards of non-profits often function below their potential because they take on too much and their focus is too broad. OGA needs to choose a handful of goals to focus on so the Board can actually complete on a few highly important strategic objectives. Toward that end, the Board will set only four goals for the next three years and pursue only the highest impact strategies with clear actions, timelines and responsibilities.

### Mission Statement

The mission of OGA is: Uniting people and organizations to enhance the lives of older Oregonians.

### Vision Statement

We envision OGA as the convener that brings people and partner organizations together to raise and discuss challenging questions and possible solutions for how to serve the aging community. Our vision for 2015 includes:

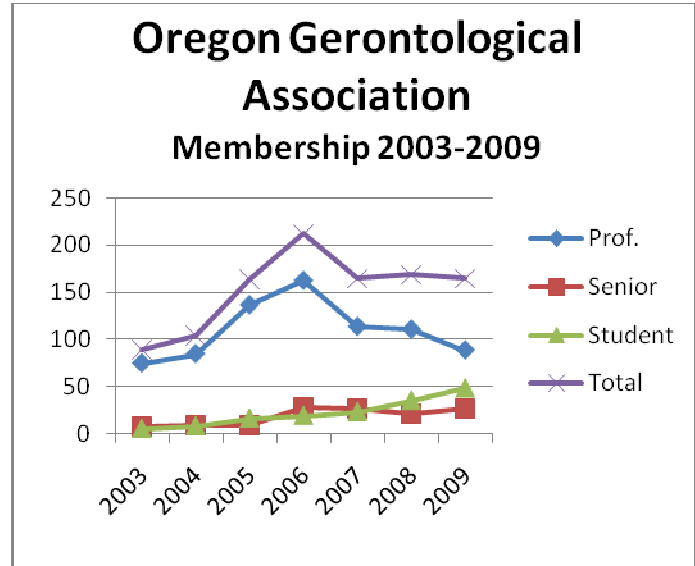
- ❖ **Diversity:** A board and membership that represents the broad field of aging and the range of professionals that serve the aging community.
- ❖ **Education:** Diverse opportunities for continuing education and professional development ranging from academic, researched-based offerings to practical applications available in a variety of forums and formats.
- ❖ **Partnerships:** Strategic relationships with organizations that have influence with and common interest in the people and issues that OGA is working to address.
- ❖ **Information:** The highest quality information and best practices on aging accessible across multiple channels.
- ❖ **Sustainability:** The necessary support, infrastructure, and flexibility to position OGA strongly for the future.

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### Goals and Strategies

**Goal 1: Expand the role of OGA to serve a diverse audience of professionals who reflect the multi-disciplinary nature of aging issues. (Connection to 2015 Vision: Diversity, Partnerships, Information, and Education)**

**Issue Statement:** OGA is a multidisciplinary organization for professionals in the field of aging providing education and awareness about aging. OGA's focus has been on professionals rather than elders directly. Over time the organization has broadened its scope from direct social services to the larger issues of growing old and later life. The composition of OGA's membership and Board has not reflected this shift.



**Strategy Statement:** OGA will become the information hub of expertise and best practices in the field of aging and a catalyst for a holistic, research-based approach to what works for older adults and professionals in the field of aging. It will focus its events, education, information, and influence to be non-redundant with other professional organizations.

**Goal 2: Create value for new and existing members. (Connection to 2015 Vision: Diversity and Education)**

**Issue Statement:**

One of the most significant challenges for OGA has been to define clear and value-added benefits to becoming a member. OGA also faces competition from other aging organizations and a perception of high membership fees. The organization has tried broadening its geographic area as a vehicle for increasing membership. Another challenge is the resources required to support the existing membership -- \$40,000 to \$50,000 in resources used to support less than 200 members.

**Strategy Statement:**

For membership development, the focus is to retain existing members while recruiting new membership from the targeted areas and professions.



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***Goal 3: Staff appropriately for OGA's newly stated vision, role, and strategic direction. (Connection to 2015 Vision: Sustainability)***

**Issue Statement:**

OGA has historically lacked the revenue to fund a *full time* administrator. The organization has looked at many options for raising the revenue necessary to fund an Executive Director position. These alternatives have ranged from increasing membership and/or the rates for membership to charging higher conference fees.

**Strategy Statement:**

We will move toward a professional executive director organizational model in support of the growth and sustainability of OGA into the future.

***Goal 4: Move the Board from an operational to a strategic focus. (Connection to 2015 Vision: Diversity and Sustainability)***

**Issue Statement:**

Cultivating leaders to fill executive positions on the Board has been an especially challenging task for OGA. Many Board members do not want to step up to the leadership positions because of the amount of work involved in leadership the lack of adequate staff support. Some board members perceive that Board membership is cliquish and that some Board members that are not active and utilized. Board members make up 14% of the total membership of OGA and 25% of professional membership.

**Strategy Statement:**

The focus for leadership development is to define and cultivate roles and responsibilities that Board members can follow-through on.

## Implementation

Strategic plans fail for two main reasons: 1) they get drafted and then put on a shelf, and 2) the plan is has too many goals and involves too many people. Successful implementation does not have to be difficult or complicated. The Board must commit to working the plan all the time and at every board meeting. This is accomplished in three simple ways:

- Items from the strategic plan are on the agenda of every board meeting,;
- The Board uses the “Unity of Purpose” framework at least quarterly to ensure the organization’s people, structure, processes, activities, and resources are continuously aligned with the plan; and
- The plan is reviewed and updated annually to reflect the changing and evolving environment in which the organization operates and to ensure the strategies are consistent with and will achieve the goals. Strategies and activities may need to be updated, but the goals should remain the same, unless there is a significant change in the environment in which OGA is operating.



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### **The Unity of Purpose Framework:**

The Board will use the framework of the following three questions to make course corrections during the lifecycle of the plan. The Framework consists of three questions:

- 1) Are we doing the right thing(s)? Given trends, history, future focus, vision, etc. are we doing the right things?

For example: Is it right to have an annual conference as our featured educational and networking event?

- 2) Are we doing things right?

For example: If the annual conference is our featured educational and networking event, are we doing everything we can to get maximum value for OGA and for our membership?

- 3) Does everyone involved—board members, members, partners, and people who aren't yet engaged with us yet—understand how they relate to one another and the interdependencies?

For example: What do we give to our partners and what do they get from us?

### **Critical Success Requirements:**

The following are required factors for succeeding in implementing the strategic plan and achieving the stated goals. The board will need to maintain a close eye to these requirements and determine if anything is occurring that derails or detracts from success.

- Monthly meetings of the full board until roles and responsibilities for the strategic plan are clear and the plan has been launched.
- Monthly Executive Committee meetings to ensure action on short term actions.
- All Board members have a role in the plan, are committed to their responsibility and clear understanding of what is expected.
- The right Committee structures and work groups are in place to carry out the plan.