

**MCOA Staff and Board Retreat**  
**January 9, 2015 and Reviewed April 17, 2015**  
**Report on Revised Goals and Objectives,**  
**Proposed Initiatives, and Comments Regarding the Future of MCOA**  
**Respectfully submitted by, JJ Durham, Consultant/Facilitator**

**GOAL I: ADVOCACY and LEGISLATION**

Develop a membership driven legislative agenda that enhances/increases programs and services for Massachusetts' older adults.

- Objective A: Develop a legislative campaign that reflects the needs of the aging population and preserves or enhances local and federal grant allocations.
- Objective B: Collaborate with other elder advocates and senior focused organizations to develop a strategy for the enactment of federal and state legislation that is of benefit to Massachusetts older adults.
- Objective C: Advocate for economic security for Massachusetts older adults with limited income including; tax relief, access to affordable housing, nutrition and transportation.
- Objective D: Collaborate with a variety of invested partners to develop a campaign to advocate for mental health services and resources for Massachusetts older adults.
- Objective E: Provide input on national issues affecting older adults and promote the work of Massachusetts Councils on Aging and Senior Centers through the development of relationships with the Congressional delegation, federal agencies and national associations.
- Objective F: Diversify funding by identifying sources for COAs and MCOA from businesses, foundations and healthcare organizations.
- Objective G: Broaden awareness and active participation in legislative agenda by membership and older adults.
- Objective H: Utilize social media for legislative advocacy.

**GOAL 2: TRAINING and EDUCATION**

Provide educational opportunities for Council on Aging and Senior Center staff to enhance their ability to provide cost-effective services and effective programs to Massachusetts older adults.

- Objective A: Conduct a yearly conference that provides training on topics relevant to Councils on Aging, Senior Centers and other providers working with older adults.
- Objective B: Partner with the Regional Associations to provide educational opportunities in a variety of locations throughout the year in coordination with the MCOA calendar.
- Objective C: Utilize quarterly membership meetings and working groups as a venue for training COA staff on relevant issues and topics.
- Objective D: Serve as a primary clearinghouse for information and training opportunities for MCOA members and others seeking information about older adults through the MCOA website.
- Objective E: Promote membership in NCOA/NISC among MCOA members as a venue for education and training opportunities.
- Objective F: Identify local and national trends regarding best practices including NISC programs of excellence and disseminate information to membership.

## **P. 2 MCOA Revised Goals and Objectives**

### **GOAL 3: LEADERSHIP and PROFESSIONALISM**

Promote the development of leadership and management skills among MCOA members.

- Objective A: Provide mentoring for new Council on Aging/Senior Center Directors to assist new directors in becoming familiar/comfortable in their role.
- Objective B: Provide a variety of opportunities to the membership to develop their leadership skills through local associations, the MCOA Advisory Council and Executive Board, Task Forces, Working Groups and as liaisons to other elder care partners/stakeholders.
- Objective C: Promote the Certification Process for Directors and Program Managers by providing at least one annual training and a mentoring program. Formally recognize those achieving Certification annually.
- Objective D: Encourage Massachusetts Senior Centers to seek National Senior Center Accreditation through NISC. Formally recognize those achieving Accreditation annually.
- Objective E: Assist Senior Center Board members in effectively filling the roles through an annual training for Board members.

### **GOAL 4: COMMUNITY FOCAL POINTS/OUTREACH and MARKETING**

To position Councils on Aging as the community focal points for the delivery of services and programs to Massachusetts older adults.

- Objective A: Develop a communications and marketing strategy to educate the public and the membership about the mission, values and core services of Councils on Aging and Senior Centers in Massachusetts utilizing multiple forms of media.
- Objective B: Develop programs and activities for the full range of older adults aged 60+ including underserved populations and ensure that Senior Centers are a welcoming place for all older adults in Massachusetts.
- Objective C: Strengthen relationships with government agencies, municipalities, stakeholders, the general public and other senior focused organizations to build capacity and increase community engagement in Councils on Aging and Senior Centers.
- Objective D: Promote the value of MCOA membership to professional working with older adults.

### **GOAL 5: MCOA OPERATIONS**

Ensure that the MCOA board and agency operates in an effective and efficient manner that meets the needs of its members.

- Objective A: Develop a plan that provides for sufficient and well-trained staff members to meet the organization's needs.
- Objective B: Develop a financial plan that accurately reflects the operational revenues and expenses based on MCOA's history and other identified factors.
- Objective C: Position MCOA as the "go to" organization for Councils on Aging and Senior Centers and those seeking information about local issues that affect Massachusetts older adults.
- Objective D: Develop a marketing strategy for MCOA.

## **P. 3 MCOA**

### **PROPOSED INITIATIVES**

#### **Governance/Operations**

- Create long term strategic plan for MCOA
- Create succession process for board and committee members
- Create process for leaders of working groups and task forces to report back to MCOA and membership
- Change the purpose of task forces and working groups to be an advocacy and program development role, not education for members as focus.
- Streamline list of taskforces and workgroups and align into a smaller number of thematic groups. Consider using a blend of the Age Friendly and Aging Well categories of need as themes when re-organizing into 9-10 groups
- Create Code of Ethics for the work we do
- Create a Bill of Rights for older adults

#### **Training and Education**

- Market Conference to other professionals working with older adults i.e. assisted living and nursing facilities, related businesses and healthcare organizations including hospitals
- Offer new tracks at Conference or other venues for; seasoned directors, selectmen and city managers, AMP participants, mental health providers
- Offer content at Conference or other venues i.e. grant writing, mental health in older adults, self care for care takers and staff of COAs and Senior Centers
- Offer scholarships and incentives for small and rural COAs to attend Conference
- Utilize webinars and online courses to increase access to training and education

#### **Leadership and Professionalism**

- Rebrand and expand the MCOA training and modules to additional professionals.
- Share accomplishments of centers and center leaders frequently
- Assess the feasibility for developing a MCOA Geriatric Institute for training function, so that MCOA is viewed as the go-to place for aging. Ideas:
  - Students who take a certain core set of courses can get certified, work with universities in state to develop a training track for workers
  - Expand geriatric institute to include students in our training and engage them in our network early in their careers. (Salem State, BU, BC, Bridgewater have older adult tracks)
  - Create a regional social work position as clinical supervisor to interns working in COAs (clinical social work students need LISCW for supervision)
- Assess and review the certification system and its goals. Ideas:
  - Explore what other positions might get certified
  - Explore the possibility of an abbreviated certification process for seasoned directors
  - Rebrand certification and accreditation to promote value
  - Increase 1:1 coaching provided to center leaders via a new mentorship program (mentors outside of the certification mentors.)
- Conduct a skills inventory of leaders of COA and Senior Centers to identify specific skill sets for sharing best practices and/or to utilize as opportunities/needs arise.
- Make funds available for local COAs to engage in strategic planning

## **P. 4 MCOA**

### **PROPOSED INITIATIVES *continued***

#### **Technology**

- Utilize webinars and online courses to increase access to training and education
- Invest in technology and stay current
- Explore a partnership with Best Buy or others to fund equipment and training at local centers
- Explore expansion of MCOA website to host pages of local COAs

#### **Community Focal Points/Outreach and Marketing**

- Rebrand – what is a senior center in the 21<sup>st</sup> century
- Generate articles for distribution to local papers to create awareness of services and achieve greater presence

#### **Discussion regarding Future Directions of MCOA**

1. How will we make decisions about new opportunities? What will be our guiding principles?
2. We've experienced rapid growth recently, and we are just where we should be, due to the Executive director's direction for the agency staff.
3. We should be the "cutting edge".
4. I am looking to MCOA to develop a set of unified messages for all COAs to publish so that we are connected in the themes we promote and the way we state our core messages.
5. I'd like to have MCOA become a clearinghouse for offering to COAs grant opportunities and/or information about grants they may pursue independently.
6. Please consider ways to preserve time between just the Board and the Executive Director, without staff at all Board meetings.
7. We need to add/reflect community older adult representatives into our governance structure.
8. We must strengthen the role of the regional representatives - raise the expectations for what their tasks and roles are. Ideas: holding a webinar and then having local leaders facilitate local discussions, having mentors come from regional representative corps.
9. Include non-COA social service providers into our advisory council to increase the knowledge, skills and diversity of our team.
10. Re-establish our array of working groups to ensure we are looking at topics relevant to Healthy Aging needs and services, including but not limited to Nutrition, Transportation, and Affordable Housing.
11. Make our Board meetings more interactive by sending homework/information in advance to support interaction and decisions.
12. Develop a fundraising strategy for maintaining and/or increasing MCOA's current budget.
13. Establish a process for MCOA's representatives to commissions and taskforces to send reports back to MCOA centrally and to inform membership of what is happening across all of these fronts.
14. The role of the local boards of COAs should be re-envisioned for the 21<sup>st</sup> century and a strategy devised to pursue the new role.