

# Baseline for 60+



# I. OVERVIEW

# I. OVERVIEW:

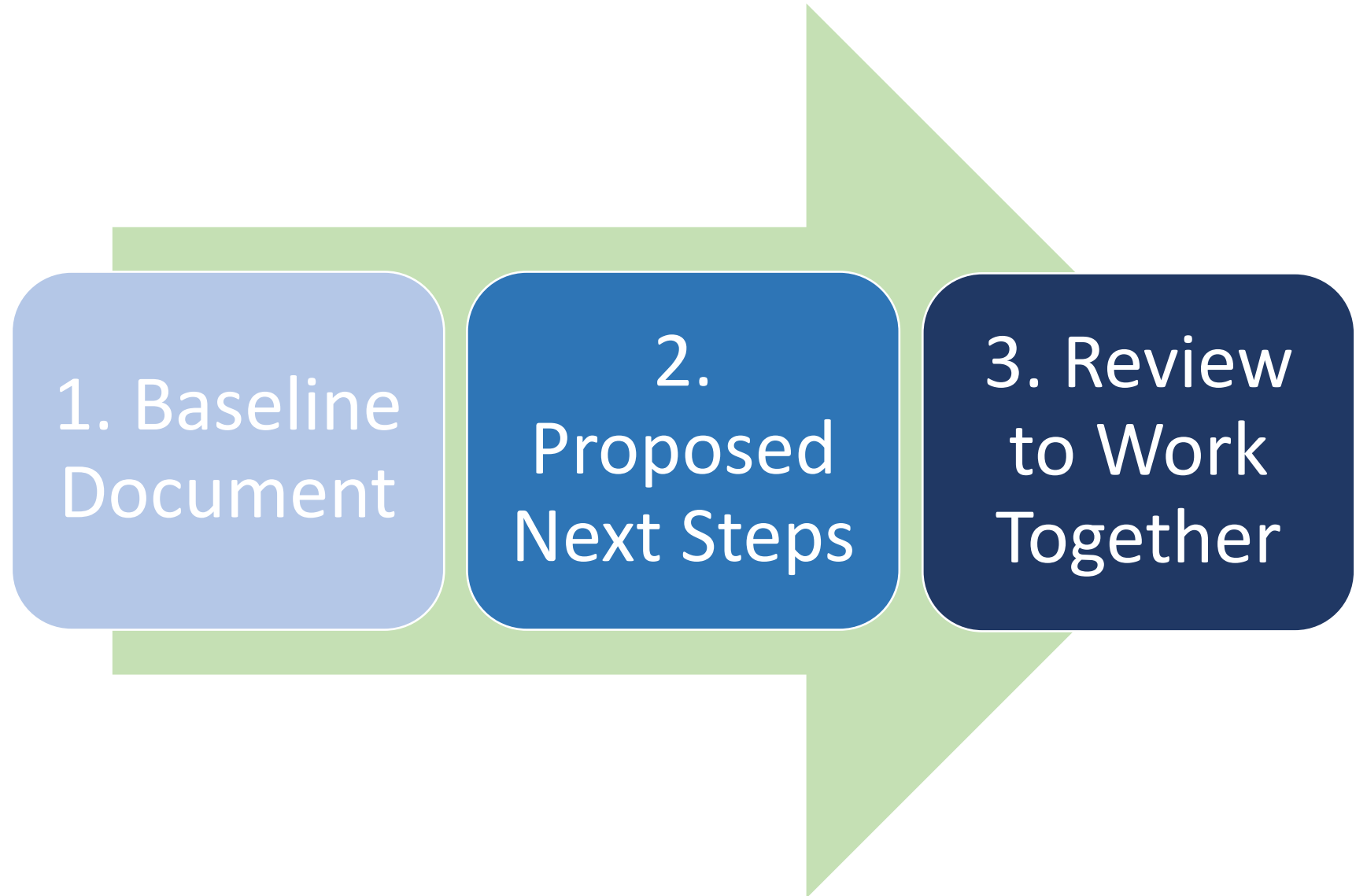
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# Executive Summary

This document is an evolving piece to look closely at the nonprofit and begin to plan a committed strategy.

1. Consider the baseline status of the agency.
2. Consider proposed Next Steps to ensure the organization's continued growth, effectiveness, and impact in serving older adults in Weld County.
3. Review and modify to work on plan together.



## II. Organizational Overview

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## BOARD

**President**

### **Kent Naughton**

Past Chairman

Kent Naughton is a partner at Witwer, Oldenburg, Barry & Groom, where he specializes in a wide variety of civil matters, from litigation to complex transactions. Prior to joining his law firm, Kent served as a law clerk for the Honorable Walker D. Miller, United States District Court, District of Colorado. Kent earned his BA in political science at Colorado State University, and his JD at the University of Colorado. He lives in the Greeley area with his wife, Kelyn, and their two daughters.

### **Michael Muskin**

Treasurer

Michael Muskin has spent more than 25 years working primarily for human service nonprofits. He was the executive director for three of those nonprofits: Greeley Transitional House, Team Fort Collins, and Weld County Partners. Michael's last position was with the University of Northern Colorado as the development director for the College of Education. He is currently retired.

### **Eva Jewell**

Secretary

Eva is a native of Augusta, Georgia, home of the Master's golf tournament and all things southern! She moved to Greeley with her husband and two sons in 1984 after her husband accepted a faculty position at the University of Northern Colorado. Eva attended Augusta State University and graduated with a Bachelor of Arts in Psychology and earned her Masters' degree in Gerontology from the University of Northern Colorado (Go Bears!). In 1987, she was fortunate to join the staff of the Weld County Department of Human Services Area Agency on Aging. There she spent the next 32 years providing a variety of aging services to the seniors of Weld County. Eva was honored to spend the last 18 years of her time with the Weld Agency on Aging as the Director and Division Head of the agency. Time stands still for no one so after much soul searching, Eva decided to retire in 2019 to spend more time with family and friends and peruse traveling, gardening, and volunteering for great causes!

### **Julie V**

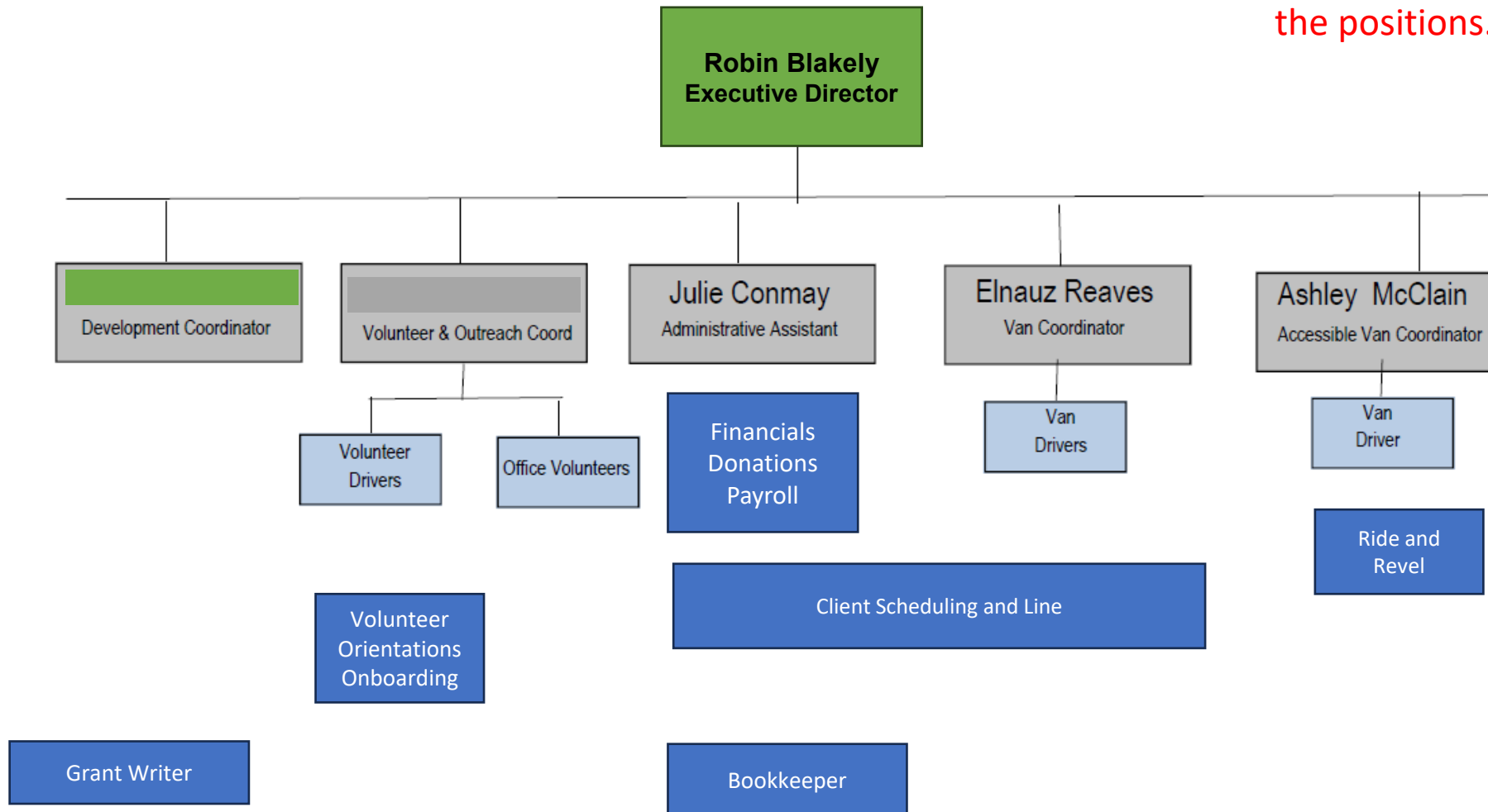
### **Marie**

We need bios for all board members. We need to update on the website. We need photos.

# II. Organizational Overview

## STAFF

We need bios and pics for all staff. We need to update on the website. We need to restructure the positions.



# II. Organizational Overview

## VOLUNTEERS

We have 57 Active volunteers.  
 We are being Audited for background checks and insurance compliance in March 2024.

Active volunteers - Totally Cleared/ Documents in File				
Name	Status	Email	Referred By	Phone
Tom Barbour	Active	bobtom@comcast.net		9703966483
Eileen Beal	Active	eojb@visn.net		2163097208
Lucy Capetillo	Active	lucycapetillo@yahoo.com		7207576525
John Dudley	Active	doright48@aol.com		9703712284
Amy Fanning	Active	hornshoe4@yahoo.com		9703979405
Kerry Gunby	Active	gumby181@comcast.net	Referred by wife/volunteer Pat Sprock	9703531752
Shelly Hilterman	Active	iltermanshelly@gmail.com		2817974105
James (Jim) Hockman	Active	jhawk62@comcast.net		3038773335
Tim Hullinger	Active	timhullinger@msn.com		9169698311
Chris Hyland	Active	chris_hyland@yahoo.com		9704153692
Timothy Johnson	Active	mjohnson0617@gmail.com		3035796604
Amy Junge	Active	koyu7@msn.com		3036012673
Laura Kaveny	Active	kavenylaura@gmail.com		9703360181
Shirley Landwehr	Active			9703245809
Susie Lang	Active	suzette2454@hotmail.com		7199308410
Carol Marston	Active	jamebutterfly336@gmail.com		9703973996
Sharon McCabe	Active	smmccabe1@cloud.com		9703026217
Michael McGinnis	Active	niceday4it@aol.com		9702130307
Diane McVicker	Active	dianegrly@aol.com		9705185615
Andre Perrault	Active	aren.perrault@gmail.com		7143344548
Karen Perrault	Active	aren.perrault@gmail.com		7148396463
Ivy Pierce	Active	paulivypierce@gmail.com		9706865185
Linda Reiter	Active	LRGREELEY@gmail.com		9705344101
Jennifer Sator	Active	nnifer.sator@financial.com		9705802527
Liz Sauter	Active	lizsauter62@gmail.com		3038152731
Bonnie Scherr	Active	bscherrmom@gmail.com		9705769278
Ada Sisseck	Active	sisseck1957@gmail.com		7202520365
Kevin Smith	Active	KS8660@gmail.com		9705561252
Patricia (Pat) Sprock	Active	patsprock1@comcast.net		9703815847
Michael Stewart	Active	mstew227@comcast.net		9705907823
Cindy Swank	Active	jedcindy@msn.com		9704058030
Kathy Talkington	Active	dktalk.david@gmail.com		9795870147
Donna Upton	Active	coffee4health@juno.com	Women In Business	9706909829
Shan Watkins	Active	srwatkins88@gmail.com		9703247605
Larry Wood	Active	woodlarry1953@gmail.com		9703816392
Anice Young	Active	anice.young@comcast.net		9703024268
Delfina Zamora	Active	dfina_archuleta@yahoo.com		9705452680
Roger Jordan	Active	oger_jordan58@msn.com		9704150987
Bill Bobb	Active	bmdj4@msn.com		3039602181
Kate Howell	Active	tehowellrealtor@gmail.com	Women In Business	9705764792
Mary Schafer	Active	schafarms67@yahoo.com		9703814212
Renee Winklemann	Active	renee72buzz@gmail.com		3039290385
Carla Winstead	Active	wbgwinstead@gmail.com		3039074265
Joshua DeOliveira	Active	thegeolojosh@gmail.com		2692811167
Kathy Merritt	Active	chipandkathy@gmail.com		9702318384
Mary Achziger	Active	maryachziger@gmail.com		9703813408
John Anderson	Active	jschickelstein@aol.com	Wife's name and phone	8104023381
Johnnie "Ella" Childs	Active	johnnie11@gmail.com	Wife's name	8103818614
William "Rock" Cunningham	Active	emmgard5@gmail.com	Referred by volunteer Lisa Sauter	3181082133
Brianne Fennell	Active	bfennell123@comcast.net	Referred by volunteer Cynthia Dejeucox	8103311368
Donna Fennell	Active	dfennell@comcast.net	Wife's name and phone	8106900516
Debra James	Active	debrajames4@gmail.com	Wife's name and phone	8103110600



# II. Organizational Overview

## GRANTORS

We have grantors.

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PAST- Anschutz Family Foundation

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AV Hunter Trust

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Colorado Combined Campaign

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Eldergarden

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Community Development Block Grant (CDBG) City of Greeley

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Larimer Office on Aging

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NFRMPO

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Our Savior's Luthern Church

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United Way of Weld County Collective Impact Grant

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Virginia Hill Foundation

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Weld Area Agency on Aging (AAA)

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Weld Women's Fund

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Weld Trust

# III. Environmental Challenges

# III. Overview of Environmental Challenges

These points need to be identified and embedded in our materials in a way that they can be part of grant requests.

## **Transportation Deserts.**

Weld County is a rural territory. 60+ is dedicated to supporting aging in place by providing personalized transportation services tailored to older adults' mobility needs, including rural communities and marginalized populations. The vast number of transportation deserts that exist across the 4017 square mile area of Weld County make providing services challenging. Transportation barriers have a significant impact on healthcare access.

## **The Origin Era of the Client.**

**Digital equity is harder to achieve with clients born before 1950.** Many older adults face barriers to technology adoption, hindering access to essential services and social connectivity. The exploding rise in the number of "old-old" individuals aged 75 and above who did not grow up with cell phones or home computers, require tailored approaches to meet needs that are connected to the era of their origin. 60 Plus needs support to bridge the digital divide, ensuring inclusive access to digital services.

## **Rapid Demographic Shifts.**

**The evolving demographic makes it difficult to adapt fast enough.** The rapid transition from a predominantly White to Latino population in Weld County brings different challenges with the older adult population, such as language barriers and feelings of isolation within swiftly evolving communities. To address these challenges, we require Spanish-language materials and culturally sensitive approaches to ensure effective access to transportation services and nurture a sense of belonging.

**Aging In Place.** Our goal is to empower older adults to access essential services, social activities, and stay connected with their communities while living as independently as possible where they feel most comfortable. We focus on helping older adults access resources and support networks that contribute to their well-being. We're committed to helping older adults age in place with dignity, autonomy, and a sense of belonging. Our commitment includes rural communities and marginalized populations. We address transportation disparities and make sure older adults have equitable access to services. We specifically serve older adults in rural areas where transportation options may be limited, making sure they can still get what they need.

**Ageism.** The term "ageism" refers to two concepts: a socially constructed way of thinking about older adults based on negative attitudes and stereotypes about aging and a tendency to structure society based on an assumption that everyone is young, thereby failing to respond appropriately to the real needs of older people. Through every phone call and ride that we provide, we challenge stereotypes and biases against aging. Examples of ageism stereotypes are: Older people cannot take care of themselves. They are sickly and belong in nursing homes. They cannot make decisions for themselves. Our personalized transportation options empower older adults to maintain their independence and access essential services with dignity, addressing obstacles like limited mobility and digital literacy head-on.. Our person-centered approach promotes dignity, respect, and fosters a more inclusive and age-positive community culture.

# IV. SWOT ANALYSIS

# IV. SWOT Analysis

**A SWOT analysis of our organization reveals several key insights about our current position and for our potential future direction.**

Strengths include our solid reputation for valuable work, readiness for grants, skilled staff, networking mindset, and strong community relationships. These strengths position us well to capitalize on opportunities such as expanding partnerships and programs, increasing visibility, and engaging with cities for collaboration. Additionally, our solid fundraising events hold potential media appeal, and there's an opportunity to focus on staff retention strategies to enhance organizational culture. However, weaknesses such as the lack of a strategic grant calendar, talent retention, formal promotional development, and a strategic plan, as well as limited media coverage and coordination for annual events, present challenges. Moreover, threats such as timing issues for 2024 grants, payroll issues, lack of visibility, competition from other services, and economic challenges such as rising gas prices could impede our progress if not addressed effectively.

By leveraging our strengths and addressing weaknesses while capitalizing on opportunities and mitigating threats, we can position ourselves for continued success and impact in our community.

# IV. SWOT Analysis



# V. Five Critical Areas Overview

# V. Five Critical Areas Overview

This plan takes a deep dive into 5 critical areas that can help strengthen the agency's position as a vital resource for older adults, their families, and the communities across Weld County.

## SECTION 1. Mission Clarity:

Goal: To identify and articulate a clear, consistent and defining message around who 60+ is and what 60+ does to make a difference in our community

- Why are we in operation?
- What does 60+ make a difference in the community?

## SECTION 2. Financial Sustainability:

Goal: To keep 60+ alive and relevant while allowing the board, staff and community to fulfill the mission of 60+.

- How do we sustain our operations?

## SECTION 3. Marketing and PR:

Goal: To create a coordinated strategy around communicating 60+'s message to the community while building relationships and partnerships to advance the mission.

- How does 60+ communicate our mission to a wider audience?

## SECTION 4. Community Engagement:

Goal: To raise awareness within Weld County about the essential factors to the 60+ mission of empowering, advocating, and educating.

- How do we raise awareness of our mission and earn community support?

## SECTION 5. Infrastructure and Process:

Goal: To implement our strategic vision. Improve the delivery of our mission and ensure a sustainable organization.

- Is our organization's infrastructure aligned with the strategic goals?





Five Critical Areas Overview

# Section One: Mission Clarity

# SECTION 1. Mission Clarity:



## Mission Statement:

To offer older adults the opportunity to maintain their physical, emotional, and mental health while living independently.

# SECTION ONE: Mission Clarity

We need to update the mission statement.

1. Why is 60+ in operation?
2. What does 60+ do to make a difference in the community?

**Mission Statement:** To offer older adults the opportunity to maintain their physical, emotional, and mental health while living independently.

## **Mission Clarity:**

### 1. Why is 60+ in operation?

60+ operates to address transportation needs and challenges faced by individuals 60 years old and older who live anywhere in Weld County. We are committed to addressing the importance of aging in place. We firmly believe that access to transportation not only provides every older adult with vital support but also opens doors to meaningful engagement opportunities that can improve quality of life.

### 2. We make a difference by enhancing the quality of life for older adults in very significant ways:

- **providing essential transportation** to medical visits, grocery shopping, social service programs and more.
- **fostering social connections** that help reduce feelings of isolation, loneliness, and depression by providing transportation to social events and activities, volunteer opportunities, and peer support activities.
- **advocating for the rights, well-being, and interests of older adults** by promoting understanding and empathy in the context of the following four areas:
  1. Transportation
  2. Aging in place
  3. Digital inclusion
  4. Combatting Ageism-- The term "ageism" refers to two concepts:  
a socially constructed way of thinking about older adults based on negative attitudes and stereotypes about aging AND the tendency to structure society based on an assumption that everyone is young, thereby failing to respond appropriately to the real needs of older people.

Mission Clarity: ACTION STEPS	Timeline/Milestones	Leaders	Resources	Ongoing Actions
<p><b>1. Review and Refine Mission Statement:</b></p> <ul style="list-style-type: none"> <li>Evaluate the current mission statement to ensure alignment with organizational goals and values.</li> <li>Identify any areas for improvement or clarification.</li> <li>Refine the mission statement to accurately reflect 60+'s purpose and objectives.</li> </ul> <p><b>2. Internal Communication / Training:</b></p> <ul style="list-style-type: none"> <li>Communicate the revised mission statement to all staff members and volunteers.</li> <li>Provide training sessions or workshops to ensure understanding and alignment with the mission.</li> <li>Encourage team to incorporate the mission into their daily work and decision-making processes.</li> </ul> <p><b>3. External Communication:</b></p> <ul style="list-style-type: none"> <li>Update marketing materials, website, and other external communication channels to reflect the refined mission statement.</li> <li>Develop messaging guidelines to ensure consistency in communicating the mission to external stakeholders.</li> <li>Share the mission statement with partners, donors, and the community to increase awareness and understanding.</li> </ul>	<p><b>1. Review / Refine Mission Statement:</b></p> <ul style="list-style-type: none"> <li>Evaluation and identification of improvements: 2 weeks</li> <li>Refinement of mission statement: 1 week</li> </ul> <p><b>2. Internal Communication / Training:</b></p> <ul style="list-style-type: none"> <li>Communication of revised mission statement: Immediately after refinement</li> <li>Training sessions/workshops: 1 month</li> </ul> <p><b>3. External Communication:</b></p> <ul style="list-style-type: none"> <li>Update marketing materials and website: 2 weeks</li> <li>Development of messaging guidelines: 3 weeks</li> <li>Sharing mission statement with stakeholders: Ongoing</li> </ul>	<p><b>1. Review / Refine Mission Statement:</b> Executive Director</p> <p><b>2. Internal Communication / Training:</b> Executive Director as HR</p> <p><b>3. External Communication:</b> Executive Director as Marketing and Communications Manager</p>	<ul style="list-style-type: none"> <li>Time for leadership and staff to participate in review and refinement process</li> <li>Space and times for training sessions/workshops</li> <li>Access to marketing materials and website for updates</li> <li>Coordination with team for external communication efforts</li> </ul>	<ul style="list-style-type: none"> <li>Regularly review the mission statement to ensure continued alignment with organizational goals and values.</li> <li>Integrate the mission statement into ongoing communication and decision-making processes within the organization.</li> <li>Seek feedback from staff, volunteers, and stakeholders to identify any areas for improvement or adjustment to the mission statement.</li> <li>Monitor the organization's activities and initiatives to ensure they align with the mission and adjust as necessary.</li> </ul>

Five Critical Areas Overview

# Section Two: Financial Sustainability

# SECTION TWO: Financial Sustainability

- How does 60+ sustain operations?

## **Financial Sustainability:**

To sustain our operations, 60+ employs a multifaceted approach.

This includes diversifying funding sources through the following:

- Volunteer-led service programs
- Grants
- Donations
- Corporate sponsorships

We also emphasize prudent financial management, cost-effectiveness, and transparent reporting to ensure fiscal responsibility and long-term viability.

Financial Sustainability / ACTION STEPS	Timeline/Milestones	Leaders	Resources	Ongoing Actions
<p><b>1. Grant Acquisition:</b></p> <ul style="list-style-type: none"> <li>• Research and identify potential grant opportunities from government agencies, foundations, and other funders.</li> <li>• Develop grant proposals tailored to each opportunity.</li> <li>• Submit grant applications according to deadlines.</li> <li>• Cultivate relationships with grant makers to enhance future funding prospects.</li> </ul> <p><b>2. Donor Cultivation / Stewardship:</b></p> <ul style="list-style-type: none"> <li>• Segment donor lists based on giving history and preferences.</li> <li>• Develop personalized communication strategies for each donor segment, including newsletters, emails, and donor appreciation events.</li> <li>• Regularly update donors on the impact of their contributions and express gratitude for their support.</li> <li>• Provide opportunities for donors to engage with the organization through volunteer opportunities, special events, and donor recognition programs.</li> </ul> <p><b>3. Corporate Sponsorship Development:</b></p> <ul style="list-style-type: none"> <li>• Identify potential corporate sponsors whose values align with our mission and programs.</li> <li>• Develop sponsorship packages outlining benefits and recognition opportunities for sponsors.</li> <li>• Reach out to corporate contacts to present sponsorship proposals and cultivate relationships.</li> <li>• Negotiate sponsorship agreements and ensure fulfillment of sponsorship benefits.</li> </ul> <p><b>4. Volunteer-Led Service Programs:</b></p> <ul style="list-style-type: none"> <li>• Identify service opportunities suitable for volunteer involvement, such as drivers, community events, administrative support, or fundraising activities.</li> <li>• Recruit and train volunteers for service programs.</li> <li>• Provide ongoing support and supervision to volunteers.</li> <li>• Recognize and appreciate volunteers for their contributions.</li> </ul> <p><b>5. Financial Management and Reporting:</b></p> <ul style="list-style-type: none"> <li>• Implement financial management systems to track income, expenses, and budget allocations.</li> <li>• Conduct regular financial audits to ensure accuracy and compliance with regulations.</li> <li>• Generate financial reports for board members to provide transparency and accountability.</li> <li>• Review financial performance for improvement and cost-saving opportunities.</li> </ul>	<p><b>1. Grant Acquisition:</b>  Research and identification: 1 month  Proposal development: 2 months  Application submission: Ongoing</p> <p><b>2. Donor Cultivation / Stewardship:</b>  Donor segmentation: 2 weeks  Communication strategy: 1 month  Ongoing stewardship activities: Quarterly</p> <p><b>3. Corporate Sponsorship Development:</b>  Sponsorship package development: 1 month  Outreach and negotiations: Ongoing</p> <p><b>4. Volunteer-Led Service Programs:</b>  Service opportunity identification: 2 weeks  Volunteer recruitment and training: Ongoing  Program implementation: Ongoing</p> <p><b>5. Financial Management and Reporting:</b>  Financial management system implementation: 1 month  Financial audits: Annually  Reporting: Quarterly</p>	<p><b>1. Grant Acquisition:</b>  Executive Director and Grant Writer as Development Director</p> <p><b>2. Donor Cultivation / Stewardship:</b>  Executive Director as Development Manager</p> <p><b>3. Corporate Sponsorship Development:</b>  Executive Director as Corporate Relations Manager</p> <p><b>4. Volunteer-Led Service Programs:</b>  Volunteer Coordinator</p> <p><b>5. Financial Management and Reporting:</b>  Executive Director and Book Keeper</p>	<p>1. Research databases for grant opportunities</p> <p>2. Communication tools for donor outreach (e.g., CRM software)</p> <p>3. Marketing materials for corporate sponsorship proposals</p> <p>4. Volunteer recruitment and training materials</p> <p>5. Financial management software and reporting tools</p>	<p>1. Regularly review and update grant strategies based on funding trends and organizational needs.</p> <p>2. Maintain regular communication with donors to cultivate long-term relationships and sustain support.</p> <p>3. Monitor and evaluate the effectiveness of corporate sponsorship efforts, adjusting strategies as needed.</p> <p>4. Continuously recruit and train volunteers to support ongoing service programs and organizational activities.</p> <p>5. Conduct regular financial reviews and audits to ensure ongoing fiscal responsibility and transparency.</p>

# 1. GRANTS



## GrantWriter

Janet Axline, CGW, GPC, CFRE

current

President of Grant

Professionals

Association

Colorado Chapter

- The goal is to get the program fully developed and funding flowing.



My passion is to help nonprofit organizations find and obtain funding. I have over 30 years' experience in the nonprofit realm. I hold the Grant Professional Certified credential, the Certified Fund Raising Executive credential, I'm an American Grant Writers' Association Certified Grant Writer®, a member of the Grant Professionals Association, a member of the Association of Fundraising Professionals, and current President of Grant Professionals Association Colorado Chapter. I am a grant professional, a nonprofit consultant, and I enjoy stepping in as an Interim Executive Director for nonprofits during times of transition. I want to help you make a difference!

I earned a bachelor's degree in English with a Minor in Political Science from Colorado State University while working as an auditor and legal assistant and thinking about pursuing law. In the midst of this, I stumbled into a job as a foundation employee at a local hospital, where I learned the intricacies of a nonprofit organization, fundraising, and program/project management. This is where my passion for nonprofit began. Through the years I've worked in just about every nonprofit position there is, from database coordinator, program manager, volunteer coordinator, development officer, and executive director, to board president, and everything in between. In 2014, I decided to work independently and dedicated myself to the grants profession, allowing me to contribute to communities by helping nonprofits realize their goals.

My comprehensive understanding of what a nonprofit is and what it needs enables me to better understand your needs. As a grant professional and nonprofit consultant, I look forward to helping you achieve your goals.



# STRATEGIC PLAN 2023-2025

Mission Clarity	Marketing & PR	Financial Sustainability	Community Engagement	Infrastructure & Process
<p><b>Goal:</b> To identify and articulate a clear, consistent and defining message around who XYZ Foundation is and what XYZ Foundation does to make a difference in our community</p> <p><b>2023 KEY ACTION STEPS:</b></p> <ul style="list-style-type: none"> <li>#1: Enhance &amp;/or affirm purpose statement and core values</li> <li>#2: Assess programs to ensure alignment with mission, vision, purpose and core values</li> <li>#3: Create a mission "elevator speech" for Board, Staff &amp; Volunteers</li> </ul>	<p><b>Goal:</b> To create a coordinated and consistent strategy around communicating the organization's message to the community while building relationships and partnerships to advance the mission</p> <p><b>2023 KEY ACTION STEPS:</b></p> <ul style="list-style-type: none"> <li>#1: Create a comprehensive and professional Marketing Strategic Plan</li> <li>#2: Evaluate existing partnerships to ensure they are mission-driven and value-producing; consider eliminating some or adding new ones if warranted</li> </ul>	<p><b>Goal:</b> To keep XYZ Foundation alive and relevant while allowing the board, staff and community to fulfill the mission of XYZ Foundation</p> <p><b>2023 KEY ACTION STEPS:</b></p> <ul style="list-style-type: none"> <li>#1: Create a comprehensive and professional Fundraising Strategic Plan</li> <li>Fundraising plan to include: assessment of current revenue model, new "best practice" opportunities, staff/board deployment, and an enhanced stewardship plan</li> <li>#2: Create a Case for Support</li> </ul>	<p><b>Goal:</b> To raise awareness within the community about the essential factors to the XYZ Foundation mission of educating, advocating and empowering</p> <p><b>2023 KEY ACTION STEPS:</b></p> <ul style="list-style-type: none"> <li>#1: Assess current volunteer program against priority needs; leverage specific talents; consider a "Speakers Bureau" or similar trained volunteer model</li> <li>#2: Engage with as many relevant community constituencies as possible; participate in other organization's events and activities</li> </ul>	<p><b>Goal:</b> To implement our strategic vision, improve the delivery of our mission and ensure a sustainable organization</p> <p><b>2023 KEY ACTION STEPS:</b></p> <ul style="list-style-type: none"> <li>#1: Evaluate and align staff time/resources/position descriptions with strategic needs</li> <li>#2: Evaluate Board position descriptions and expertise/gaps</li> <li>#3: Evaluate buildings and grounds to identify maintenance needs</li> <li>#4: Monitor and engage in national industry trends and best practices</li> </ul>

# Financial Management / Reporting:



Jenny Endreson

## BOOKKEEPER

- The goal is to get the program fully developed and the ability to create a future-facing cash flow report.

Five Critical Areas Overview

# Section Three: Marketing and PR

# SECTION THREE: Marketing and PR

- How does 60+ communicate its mission to a wider audience?

Marketing and PR: 60+ communicates its mission to a wider audience through strategic marketing and public relations initiatives. This involves leveraging various channels such as:

- social media
- traditional media outlets
- community events
- and partnerships with other organizations

We highlight the importance of our work to inspire public support

- success stories
- testimonials
- impactful statistics
- encouraging anecdotes

Marketing / PR ACTION STEPS	Timeline/Milestones	Leaders	Resources	Ongoing Actions
<p>1. Develop a comprehensive marketing and PR plan outlining strategies and tactics for leveraging social media, traditional media outlets, community events, and partnerships with other organizations.</p>	<p>1. Marketing and PR plan development – 2 weeks</p>	<p>Executive Director Leads...</p> <p>1. Marketing “Team” responsible for overall plan development and execution.</p>	<p>1. Marketing and PR team members</p>	<p>1. Regularly review and update the marketing and PR plan to adapt to changing trends and priorities.</p>
<p>2. Identify key messages and content themes that highlight the importance of our mission, including success stories, testimonials, impactful statistics, and encouraging anecdotes.</p>	<p>2. Content theme identification – 1 week</p>	<p>2. Content Creator - Tasked with creating compelling content.</p>	<p>2. Content creation tools and software</p>	<p>2. Conduct quarterly performance evaluations to assess the effectiveness and identify areas for improvement.</p>
<p>3. Create compelling content tailored to each channel, including social media posts, press releases, event materials, and partnership announcements.</p>	<p>3. Content creation - – – Ongoing</p>	<p>3, Social Media Manager - In charge of scheduling and posting content on social media platforms.</p>	<p>3. Social media management platform</p>	<p>3. Maintain open communication channels with partners and stakeholders to ensure alignment and collaboration.</p>
<p>4. Implement the marketing and PR plan by scheduling and executing content distribution across various channels.</p>	<p>4. Content distribution - – Ongoing</p>	<p>4. PR Coordinator - Handles press releases, media outreach, and partnership announcements.</p>	<p>4. Media contact database</p>	<p>4. Continuously seek out new opportunities for partnerships, media coverage, and community engagement to expand our reach and impact.</p>
<p>5. Monitor and analyze the effectiveness of marketing and PR efforts through metrics such as engagement rates, media coverage, and audience reach.</p>	<p>5. Performance monitoring and analysis – Monthly</p>	<p>5. Analytics Specialist - Analyzes performance metrics and provides insights for optimization.</p>	<p>5. Budget for sponsored content, advertising, and event materials</p>	
<p>6. Continuously optimize and adjust strategies based on performance insights and feedback.</p>	<p>6. Strategy optimization – Ongoing</p>			

## A. Awareness Stage

*FOCUS ON RAISING AWARENESS. Use existing social platforms so Priority Targets discover and better understand. Create clear content for the Priority Targets to raise awareness.*

Leverage Platforms:

Facebook

LinkedIn

Twitter

Website

newsletter

## B. Connection Stage

*FOCUS ON CONNECTION. Be sure editorial content strategically communicates to Priority Targets... Share interests. Educate. Offer Solutions.*

## C. Engagement

*FOCUS ON ENGAGEMENT GOALS: Provide a clearly defined path of choices for Priority Targets to discern easy options for engagement in one of the three specific categories below:*

### EXTERNAL OUTREACH GOALS

#### Print

Magazines and Newspapers

Direct Mail/ Newsletter

#### Broadcast

TV

Radio

Internet

#### Live

Industry Events

# Overview: Target Audience Niches

Target Audience

Older Adults



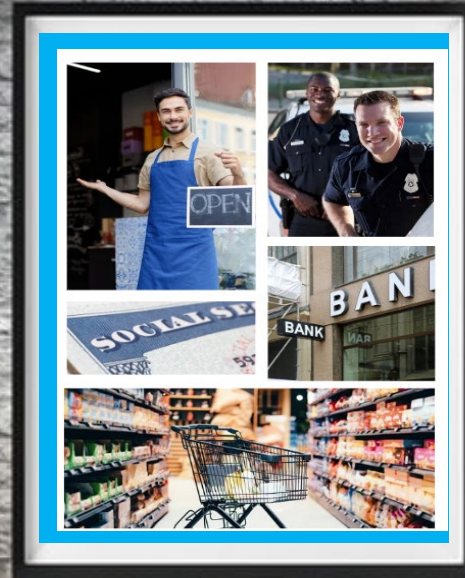
Caregivers and Family Members



Trusted Advisors and Providers



Community Partners



# Older Adults aged 60+, residing in Weld County

- 1.Older Adults Living Independently:** This segment consists of older adults who value their independence and wish to remain living in their own homes for as long as possible. They may require assistance with transportation to medical appointments, grocery shopping, social events, and other essential services.
- 2.Older Adults Seeking Social Connection:** Loneliness and social isolation are common challenges among older adults, particularly those who live alone or have limited social networks. This segment of the target audience seeks opportunities for socialization, peer support, and meaningful engagement through community events, volunteer activities, and social gatherings.
- 3.Older Adults Facing Mobility Challenges:** Another segment of the target audience includes older adults with mobility limitations, such as those who use walkers or other mobility aids. These individuals may require specialized transportation services and facilities that accommodate their mobility needs.
- 4.Older Adults Using Wheelchairs:** Individuals with mobility impairments who rely on wheelchairs face specific transportation challenges, requiring accessible vehicles and facilities. 60+ provides transportation services tailored to the needs of older adults using wheelchairs, ensuring they can access essential services and maintain their independence.
- 5.Older Adults with Chronic Health Issues:** Individuals with chronic health conditions, such as those requiring regular dialysis or chemotherapy treatments, often face challenges in accessing transportation for medical appointments. 60+ recognizes the importance of reliable and accessible transportation for older adults with chronic health issues and provides specialized services to ensure they can attend their appointments safely and on schedule.
- 6.Older Adults Facing Cognitive Impairment:** Older adults experiencing cognitive decline, memory loss, or dementia require specialized support and assistance with transportation. 60+ offers compassionate and patient-centered transportation services for individuals with cognitive impairments, ensuring their safety and well-being during transit.
- 7.Older Adults from Old-Old Eras:** Older adults from older generations, sometimes referred to as the "old-old" demographic, may have unique needs and preferences shaped by their life experiences and cultural background. 60+ recognizes the diversity within the older adult population and provides tailored transportation services that respect and accommodate the preferences of older adults from different eras.
- 8.Older Adults from the Young-Old Eras with Self-Limiting Beliefs:** Some older adults from the "young-old" demographic may resist accepting services due to self-limiting beliefs or stigma associated with aging. They may perceive accepting assistance as a sign of weakness or loss of independence. 60+ strives to address these barriers by offering supportive and empowering transportation services that respect the autonomy and dignity of older adults, regardless of age or perceived limitations.
- 9.Older Adults Facing Racial or Gender Discrimination:** Older adults who face racial or gender discrimination and prejudice may encounter barriers to accessing transportation services and other essential resources. 60+ is committed to providing inclusive and equitable transportation services for older adults of all gender, racial, and ethnic backgrounds, ensuring they feel valued, respected, and supported in their community.



# Caregivers and Family Members

- **Spouses:** Spouses are primary caregivers for many older adults, offering physical, emotional, and practical support to their partners as they age. Spouses may assist with personal care tasks, medication management, household chores, and financial matters. Spouses who serve as caregivers for their aging partners face unique challenges and health risks related to the pressure of caregiving. Spouses may experience increased stress, fatigue, and feelings of isolation, putting them at risk for caregiver burnout and health problems.
- **Adult Children:** Adult children often play a significant role in providing care and support for older adults, including assistance with activities of daily living, transportation to medical appointments, and emotional support. They help their aging parents maintain their independence and quality of life while balancing their own responsibilities and commitments.
- **Other Relatives from the Old-Old Era:** Siblings or other relatives who belong to the same older generation as the care recipient may also play a role in providing care and support. These individuals may have firsthand experience with aging-related challenges and may offer valuable insights and assistance to their older family members.
- **Other Relatives like Grandchildren with Little Life Experience:** Grandchildren, especially those who are young adults or teenagers, may step into caregiving roles for their older relatives. While they may have limited life experience compared to adult children or spouses, they can still provide valuable support, companionship, and assistance to their older family members.
- **Concerned Friends and Neighbors:** Friends and Neighbors who are not related by blood but share a close relationship with older adults in their community may also provide informal caregiving support. They may assist with tasks such as errands, household chores, or simply providing companionship and checking in on their neighbors' well-being.

# Trusted Advisors and Service Providers

- **Healthcare Providers:** Healthcare professionals, including physicians, nurses, therapists, and other medical practitioners, are essential partners in promoting the health and wellness of older adults. By establishing partnerships with healthcare providers, 60+ can ensure that older adults receive timely and appropriate medical care and support services to maintain their health and independence.
- **Faith-Based Organizations:** Churches, synagogues, mosques, and other religious institutions often offer programs and services tailored to the needs of older adults, such as senior social clubs, pastoral care, and volunteer opportunities. Engaging with faith-based organizations can provide additional avenues for social support, spiritual enrichment, and community involvement for older adults.
- **Community Centers:** Community centers serve as hubs for social, recreational, and educational activities for older adults, offering a wide range of programs and services, including fitness classes, arts and crafts workshops, and educational seminars. Partnering with community centers allows 60+ to expand its reach and offer diverse opportunities for older adults to stay active, engaged, and connected within their communities.
- **Volunteer Groups:** Volunteer organizations dedicated to older adults' welfare, such as senior companion programs, Meals on Wheels, and caregiver support groups, play a crucial role in providing practical assistance, emotional support, and companionship to older adults. Partnering with volunteer groups can enhance 60+'s capacity to deliver services and support to older adults in the community.

# Community Partners

- **Local Businesses:** Businesses within the community, such as grocery stores, pharmacies, and retail outlets, contribute to the overall health and vitality of older adults by providing essential goods and services. Collaborating with local businesses can facilitate access to resources and support older adults' independence and well-being.
- **Government Agencies:** Local, state, and federal government agencies play a critical role in developing and implementing policies and programs that support older adults' needs and promote healthy aging. Partnering with government agencies can help 60+ access funding opportunities, navigate regulatory requirements, and advocate for policy changes that benefit older adults in the community.
- **Nonprofit Organizations:** Nonprofit organizations dedicated to aging-related issues, such as senior centers, advocacy groups, and service providers, are valuable partners in addressing the diverse needs of older adults. Collaborating with nonprofits allows 60+ to leverage existing resources, share expertise, and coordinate efforts to enhance the quality of life for older adults in the community. **Academic Institutions:** Universities, colleges, and research institutions often conduct studies and develop programs focused on aging-related issues. Collaborating with academic institutions can provide access to cutting-edge research, expertise in gerontology, and opportunities for intergenerational learning and engagement.

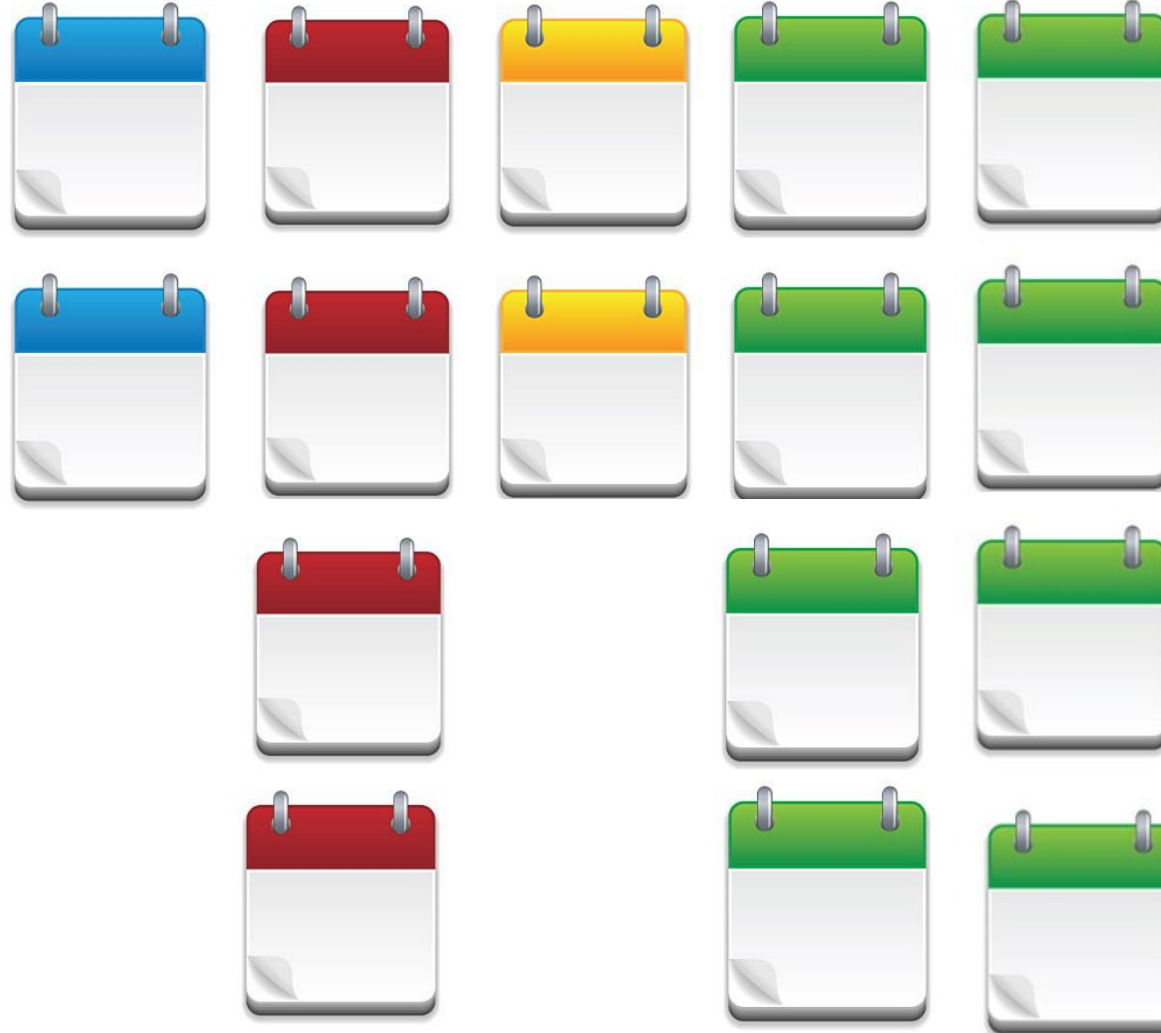
# SOCIAL MEDIA CONTENT STRATEGY

1. **Date Specific Posts**  
About 2 each month

2. **Call-to Action Posts**  
About 4 Each Month

3. **Longer Content**  
About 2 per Month  
--Newsletter  
2 x year --  
Appeal

4. **Personality Posts**  
About 8 each month  
Message A- Caregiver  
Message B- 60+ Data Points  
Message C-



March 2024 < >

S	M	T	W	T	F	S
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

April 2024 < >

S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

VOLUNTEER  
JOB LISTINGS  
BOOK

DECK FOR  
PITCHING CITIES  
AND COMPANY  
PARTNERS

SOCIAL MEDIA  
STRATEGY for  
EVENT  
For Volunteers  
For New Van Program  
For Services

Networking Calendar  
Goals

Five Critical Areas Overview

# Section Four: Community Engagement

# SECTION FOUR: Community engagement

How does 60+ raise awareness of the mission in the community and earn support?

Community Engagement: We engage with the community to raise awareness of our mission and garner support through various means.

This includes:

- organizing educational workshops
- hosting outreach events
- collaborating with local businesses and stakeholders
- and actively participating in community forums and initiatives

We prioritize

- building relationships,
- listening to community needs
- fostering a sense of ownership and pride in our shared mission

Community Engagement / ACTION STEPS	Timeline/Milestones	Leaders	Resources	Ongoing Actions
<p><b>1. Organizing Educational Workshops:</b></p> <ul style="list-style-type: none"> <li>• Determine topics based on community needs and interests.</li> <li>• Secure speakers or facilitators for each workshop.</li> <li>• Arrange venue, equipment, and materials for the workshops.</li> <li>• Promote workshops through various channels, including social media, flyers, and community newsletters.</li> <li>• Conduct the workshops and gather feedback for future improvement.</li> </ul> <p><b>2. Hosting Outreach Events:</b></p> <ul style="list-style-type: none"> <li>• Identify suitable venues and dates for outreach events.</li> <li>• Plan event logistics, including catering, signage, and activities.</li> <li>• Develop promotional materials and outreach strategies to attract attendees.</li> <li>• Coordinate with community partners and stakeholders to maximize participation.</li> <li>• Engage attendees during the event and collect contact information for follow-up.</li> </ul> <p><b>3. Collaborating with Local Businesses and Stakeholders:</b></p> <ul style="list-style-type: none"> <li>• Identify potential partners among local businesses, organizations, and institutions.</li> <li>• Initiate outreach and establish partnerships based on mutual interests and objectives.</li> <li>• Define collaboration opportunities, such as joint events, sponsorship, or resource sharing.</li> <li>• Coordinate activities and communication to ensure smooth collaboration.</li> <li>• Evaluate partnership effectiveness and explore opportunities for ongoing collaboration.</li> </ul> <p><b>4. Participating in Community Forums and Initiatives:</b></p> <ul style="list-style-type: none"> <li>• Identify relevant community forums, committees, and initiatives to participate in.</li> <li>• Assign representatives to attend meetings, contribute insights, &amp; represent 60+.</li> <li>• Prepare talking points and presentations on key issues related to 60+ mission.</li> <li>• Actively engage in discussions, networking, and collaboration opportunities.</li> <li>• Follow up on action items and commitments made during community forums.</li> </ul>	<p><b>1. Organizing Educational Workshops:</b> Topic selection and speaker confirmation: 1 month Workshop promotion and logistics planning: 2 weeks Workshop implementation: Ongoing</p> <p><b>2. Hosting Outreach Events:</b> Venue and date selection: 1 month Event planning and promotion: 4 weeks Event execution: Ongoing</p> <p><b>3. Collaborating with Local Businesses and Stakeholders:</b> Partner identification and outreach: Ongoing Collaboration planning and coordination: Varies based on partnership</p> <p><b>4. Participating in Community Forums and Initiatives:</b> Forum identification and scheduling: Ongoing Representation and participation: Varies based on forum schedule</p>	<p>Executive Director....</p> <p>1. Organizing Educational Workshops: Community Engagement Coordinator</p> <p>2. Hosting Outreach Events: Events Manager</p> <p>3. Collaborating with Local Businesses and Stakeholders: Partnership Development Officer</p> <p>4. Participating in Community Forums and Initiatives: Community Relations Manager</p>	<ol style="list-style-type: none"> <li>1. Venue and equipment for workshops and events</li> <li>2. Speakers or facilitators for educational workshops</li> <li>3. Promotional materials (flyers, posters, banners)</li> <li>4. Community contacts and partnerships database</li> <li>5. Staff time for planning, coordination, and participation</li> </ol>	<p>Regularly assess community needs and interests to inform future workshop topics and event themes. Maintain relationships with local businesses and stakeholders through regular communication and collaboration. Continuously monitor and participate in community forums and initiatives to stay informed and engaged with community issues. Solicit feedback from participants and partners to evaluate the effectiveness of community engagement efforts and make necessary adjustments.</p>



# NETWORKING in 2024

## April

Name	Activity Type	Status	Time
4/3- NorCo WIB	Networking		8:00-10:00 AM
4/3-4/5- Grown in Greeley Event UNC	Community Event		All Day
4/3- Evans Lunch and Learn	Networking		11:30 AM-1:00 PM
4/4- Carbon Valley Cares	Networking		9:30-11:00 AM
4/5- Greeley Chamber of Commerce Common Grounds Meeting	Networking		7:30-9:00 AM
4/5- Senior Networking Meeting	Networking		8:30-10:00 AM
4/9- Ride and Revel Meeting	Internal Event		11:45 AM- 1:15 PM
4/11- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30 AM-1:00 PM
4/16- Weld Community Foundation Class	Networking		11:00 AM-1:00 PM
4/16- Women of Windsor The Mill	Networking		5:30-7:30 PM
4/24- Wake Up Windsor	Networking		8:00-9:00 AM
TBD-60+ Ride Volunteer Appreciation Lunch	Internal Event		TBD

## May

Name	Activity Type	Status	Time
5/1- NorCo WIB	Networking		8:00-10:00 AM
5/1- Evans Lunch and Learn	Networking		11:30 AM-1:00 PM
5/2- Carbon Valley Cares	Networking		9:30-11:00 AM
5/3- Greeley Chamber of Commerce Common Grounds	Networking		7:30-9:00 AM
5/3- Senior Networking Meeting	Networking		8:30- 10:00 AM
5/5- First Friday Fest	Community Event		6:30-9:30 PM
5/9- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30 AM - 1:00 PM
5/12- Friday Fest	Community Event		6:30-9:30 PM
5/14- Ride and Revel Meeting	Internal Event		11:45 AM-1:00 PM
5/21- Women of Windsor The Mill	Networking		5:30-7:30 PM
5/22- Wake Up Windsor	Networking		8:00-9:00 AM
5/26- Friday Fest	Community Event		6:30-9:30 PM
5/28- NCMC (Windsor Rec)	Networking		1:00-3:30 PM

## June

Name	Activity Type	Status	Time
6/2-Friday Fest	Community Event		6:30-9:30 PM
6/5- NorCo WIB	Networking		8-10 AM
6/5- Evans Lunch and Learn	Networking		11:30 AM-1:00 PM
6/6- Carbon Valley Cares	Networking		9:30-11:00 AM
6/7- Greeley Chamber Common Grounds Meeting	Networking		7:30-9:00 AM
6/7- Senior Networking Meeting	Networking		8:30-10:00 AM
6/9- Friday Fest	Community Event		6:30-9:30 PM
6/11- Ride and Revel Meeting	Internal Event		11:45 AM-1:00 PM
6/13- Carbon Valley Chamber fo Commerce Luncheon	Networking		11:30 AM-1:00 PM
6/15- Ride and Revel Event	Internal Event		All day
6/16- Friday Fest	Community Event		6:30-9:30 PM
6/18- Women of Windsor The Mill	Networking		5:30-7:30 PM
6/18- Weld Community Foundation Class	Networking		11:00 AM- 1:00 PM
6/23- Friday Fest	Community Event		6:30-9:30 PM
6/25- Weld Community Mobility Committee (Teams)	Networking		1:30-3:00 PM
6/30- Friday Fest	Community Event		6:30-9:30 PM

## July

Name	Activity Type	Status	Time
7/3- NorCo WIB	Networking		8:00-10:00 AM
7/4- Greeley Stampede and Parade	Community Event		All day
7/5- Greeley Chamber of Commerce Common Grounds	Networking		7:30-9:00 AM
7/5- Senior Networking Meeting	Networking		8:30-10:00 AM
7/7- Friday Fest	Community Event		6:30-9:30 PM
7/11- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30 AM-1:00 PM
7/14- Friday Fest	Community Event		6:30-9:30 PM
7/16- Women of Windsor The Mill	Networking		5:30-7:30 PM
7/21- Friday Fest	Community Event		6:30-9:30 PM
7/27-7/28 Greeley Arts Picnic	Community Event		All day
7/28-Friday Fest	Community Event		6:30-9:30 PM

## August

Name	Activity Type	Status	Time
8/1- Carbon Valley Cares	Networking		9:30-11:00 AM
8/2- Greeley Chamber of Commerce Common Grounds	Networking		7:30-9:00 AM
8/2- Senior Networking Meeting	Networking		8:30-10:00 AM
8/4 Friday Fest	Community Event		6:30-9:30 PM
8/7- Evans Lunch and Learn	Networking		11:30 AM-1:00 PM
8/7- NorCo WIB	Networking		8:00-10:00 AM
8/8- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30 AM- 1:00 PM
8/11- Friday Fest	Community Event		6:30-9:30 PM
8/17- Monster Day	Community Event		Times TBD
8/18- Friday Fest	Community Event		6:30-9:30 PM
8/20- Women of Windsor The Mill	Networking		5:30-7:30 PM
8/25- Friday Fest	Community Event		6:30-9:30 PM
8/27- NCMC Meeting Windsor Rec	Networking		1:00-3:30 PM

## September

Name	Activity Type	Status	Time
9/1- Friday Fest	Community Event		6:30-9:30 PM
9/4- NorCo WIB	Networking		8:00-10:00 AM
9/4- Evans Lunch and Learn	Networking		11:30 AM- 1:30 PM
9/5- Carbon Valley Cares	Networking		9:30-11:00 AM
9/6- Greeley Chamber Common Grounds	Networking		7:30-9:00 AM
9/6- Senior Networking Meeting	Networking		8:30-10:00 AM
9/8- Friday Fest	Community Event		6:30-9:30 PM
9/12- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30 AM-1:00 PM
9/15- Last Friday Fest	Community Event		6:30-9:30 PM
9/17- Women of Windsor The Mill	Networking		5:30-7:30 PM
9/24- Weld County Mobility Committee (Teams)	Networking		1:30-3:00 PM
9/27-9/28- Greeley Oktobrew fest	Community Event		TBD
TBD- Windsor Harvest Festival	Community Event		TBD

## October

Name	Activity Type	Status	Time
10/2- NorCo WIB	Networking		8-10 AM
10/2- Evans Lunch and Learn	Community Event		11:30 AM-1:00 PM
10/3- Carbon Valley Cares	Networking		9:30-11:00 AM
10/4- Greeley Chamber of Commerce Common Grounds	Networking		7:30-9:00 AM
10/10- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30 AM-1:00 PM
10/15- Women of Windsor The Mill	Networking		5:30-7:30 PM
10/17- Weld Project Connect	Community Event		All day
TBD- Weld Senior Symposium	Community Event		TBD
TBD- 60+ Ride Volunteer Appreciation Luncheon	Internal Event		TBD

## November

Name	Activity Type	Status	Time
11/1- Senior Networking Meeting	Networking		8:30-10:00 AM
11/1- Greeley Chamber of Commerce Common Grounds	Networking		7:30-10:00 AM
11/6- Evans Lunch and Learn	Networking		11:30 AM-1:00 PM
11/7- Carbon Valley Cares	Networking		9:30-11:00 AM
11/14- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30 AM-1:00 PM
11/19- NCMC Meeting (Windsor Rec)	Networking		1:00-3:00 PM
11/19- Windsor of Windsor The Mill	Networking		5:30-7:30 PM
TBD- Festival of Trees	Community Event		TBD

## December

Name	Activity Type	Status	Time
12/4- NorCo WIB	Networking		8-10 AM
12/5- Evans Chamber Holiday Party	Networking		5-7 PM
12/5- Carbon Valley Cares	Networking		9:30-11:00 AM
12/6- Greeley Chamber of Commerce Common Gounds	Networking		7:30-9:00 AM
12/17- Weld County Mobility Committee (Teams)	Networking		1:30-3:00 PM
12/17- Women of Windsor The Mill	Networking		5:30-7:30 PM
12/19- Carbon Valley Chamber of Commerce Luncheon	Networking		11:30AM-1:00 PM
TBD- Festival of Trees	Community Event		TBD

Five Critical Areas Overview

# Section Five: Infrastructure & Process

# SECTION FIVE: Infrastructure & Process

- Is 60+'s infrastructure aligned with its strategic goals?

Infrastructure and Process: 60+ aspires to regularly assesses whether its organizational infrastructure is aligned with strategic goals. Regular reviews and feedback mechanisms help us maintain alignment and effectiveness in achieving our mission.

Our process involves:

- evaluating operational efficiency
- resource allocation
- technology integration
- staff capacity

We hope to ensure that our organization remains agile and responsive to evolving needs and opportunities.

We prioritize:

- continuous improvement
- innovation
- flexibility

Infrastructure & Process ACTION STEPS	Timeline/Milestones	Leaders	Resources	Ongoing Actions
<p><b>1. Evaluate Operational Efficiency:</b></p> <ul style="list-style-type: none"> <li>Identify key processes and workflows within 60+.</li> <li>Analyze each process to identify inefficiencies, bottlenecks, and areas for improvement.</li> <li>Develop strategies to streamline processes and improve overall efficiency.</li> <li>Implement changes based on analysis and feedback.</li> </ul> <p><b>2. Assess Resource Allocation:</b></p> <ul style="list-style-type: none"> <li>Review current resource allocation practices, including budgeting and staffing.</li> <li>Evaluate the effectiveness of resource allocation in achieving strategic goals.</li> <li>Identify areas where resources may be reallocated or reprioritized to better support organizational objectives.</li> <li>Make adjustments to resource allocation based on assessment findings.</li> </ul> <p><b>3. Integrate Technology:</b></p> <ul style="list-style-type: none"> <li>Assess current technology infrastructure and systems used within 60+</li> <li>Identify opportunities for technology integration to improve efficiency, communication, and data management.</li> <li>Research and evaluate potential technology solutions and tools.</li> <li>Develop a plan for implementing and integrating selected technology solutions.</li> </ul> <p><b>4. Evaluate Staff Capacity:</b></p> <ul style="list-style-type: none"> <li>Review current staffing levels and roles within 60+.</li> <li>Assess staff skills, expertise, and capacity to meet organizational goals.</li> <li>Identify any gaps in staffing or skills that may need to be addressed.</li> <li>Develop strategies for building staff capacity through training, hiring, or restructuring.</li> </ul>	<p>1. Evaluate Operational Efficiency: Process identification and analysis: 1 month Strategy development and implementation: 2 months</p> <p>2. Assess Resource Allocation: Review current practices: 2 weeks Evaluation and adjustment: 1 month</p> <p>3. Integrate Technology: Infrastructure assessment: 1 month Solution research and evaluation: 2 months Implementation plan development: 1 month</p> <p>4. Evaluate Staff Capacity: Staff review and assessment: 1 month Gap identification and strategy development: 1 month</p>	<p>Evaluate Operational Efficiency: Operations Manager</p> <p>Assess Resource Allocation: Finance Director</p> <p>Integrate Technology: IT Manager</p> <p>Evaluate Staff Capacity: Human Resources Manager</p>	<p>Time and expertise of relevant staff members to participate in evaluations and strategy development Access to data and information related to processes, resources, technology, and staff capacity Budget for potential technology investments or staff training Collaboration and coordination with department heads and team leaders</p>	<p>Regularly review and assess operational efficiency, resource allocation, technology integration, and staff capacity to ensure ongoing alignment with strategic goals. Implement feedback mechanisms and performance metrics to monitor the effectiveness of changes and identify areas for further improvement. Foster a culture of continuous improvement, innovation, and flexibility within the organization to adapt to evolving needs and opportunities. Conduct periodic reviews and updates to infrastructure and processes to maintain agility and responsiveness over time.</p>

# 24 /7 TECH Service



## THE LEADING PROVIDER OF TECHNICAL SUPPORT AND WORLD-CLASS CUSTOMER EXPERIENCE

KEEP YOUR BUSINESS OPERATION  
STABLE AND SCALABLE WITH ONESUPPORT

Our expertise in designing successful operational models that achieve growth, with cost-reduction in mind, for your organization is just a small part of the overall goal in achieving a long-term partnership. Our flexibility, adaptability, and tenacity is critical when understanding the needs of an organization, and the types of systems we are looking at, to create a model that supports the continued growth and success of your business.

## We received your payment

Thank you for your business. Enclosed is an invoice receipt for your records.

This email confirms your recent payment of \$179.88. Here are the details of your payment:

[View your invoice online.](#)

Your plan:

**OneSupport Yearly Support**

Next invoice date:

**Mar 4, 2025**

Date	Description	Qty	Amount
Mar 4, 2024 – Mar 4, 2025	OneSupport Yearly Support	1	\$179.88
		<b>Subtotal:</b>	<b>\$179.88</b>
		<b>Total:</b>	<b>\$179.88</b>
		<b>Paid:</b>	<b>\$179.88</b>

# DRAFT

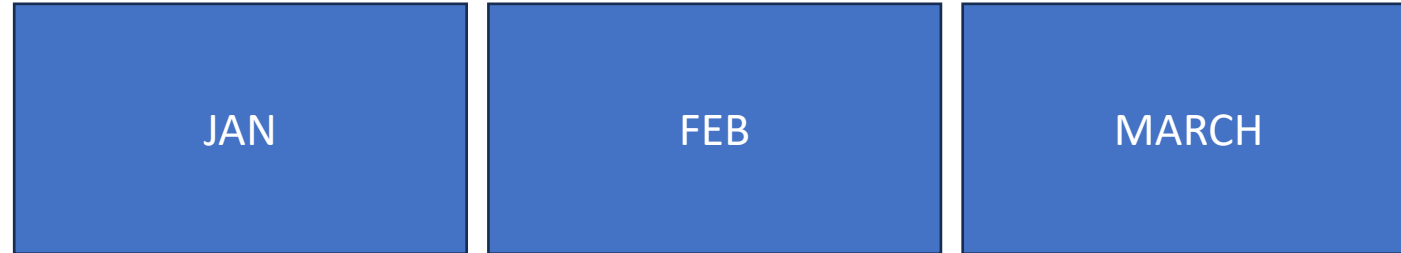
NOTE: Salary and sick days is too confusing for the bookkeeper to understand and needs to be rewritten.



# VI. Implementation Plan

## QUARTER 1

- Assess Baselines
- Identify Issues
- Begin Collaboration



## QUARTER 2

- Secure Core Staff
- Prepare for Scalability

## QUARTER 3

## QUARTER 4



## VII. Action Steps, Timelines, and Responsibilities

# VIII. Monitoring and Evaluation

# Grant Application to 50 Plus Foundation

## STRATEGIC PLAN 2023-2025

Mission Clarity	Marketing & PR	Financial Sustainability	Community Engagement	Infrastructure & Process
<p><b>Goal:</b> To identify and articulate a clear, consistent and defining message around who XYZ Foundation is and what XYZ Foundation does to make a difference in our community</p> <p><b>2023 KEY ACTION STEPS:</b></p> <p><b>#1:</b> Enhance &amp;/or affirm purpose statement and core values</p> <p><b>#2:</b> Assess programs to ensure alignment with mission, vision, purpose and core values</p> <p><b>#3:</b> Create a mission “elevator speech” for Board, Staff &amp; Volunteers</p>	<p><b>Goal:</b> To create a coordinated and consistent strategy around communicating the organization's message to the community while building relationships and partnerships to advance the mission</p> <p><b>2023 KEY ACTION STEPS:</b></p> <p><b>#1:</b> Create a comprehensive and professional Marketing Strategic Plan</p> <p><b>#2:</b> Evaluate existing partnerships to ensure they are mission-driven and value-producing; consider eliminating some or adding new ones if warranted</p>	<p><b>Goal:</b> To keep XYZ Foundation alive and relevant while allowing the board, staff and community to fulfill the mission of XYZ Foundation</p> <p><b>2023 KEY ACTION STEPS:</b></p> <p><b>#1:</b> Create a comprehensive and professional Fundraising Strategic Plan</p> <p>Fundraising plan to include: assessment of current revenue model, new “best practice” opportunities, staff/ board deployment, and an enhanced stewardship plan</p> <p><b>#2:</b> Create a Case for Support</p>	<p><b>Goal:</b> To raise awareness within the community about the essential factors to the XYZ Foundation mission of educating, advocating and empowering</p> <p><b>2023 KEY ACTION STEPS:</b></p> <p><b>#1:</b> Assess current volunteer program against priority needs; leverage specific talents; consider a “Speakers Bureau” or similar trained volunteer model</p> <p><b>#2:</b> Engage with as many relevant community constituencies as possible; participate in other organization's events and activities</p>	<p><b>Goal:</b> To implement our strategic vision, improve the delivery of our mission and ensure a sustainable organization</p> <p><b>2023 KEY ACTION STEPS:</b></p> <p><b>#1:</b> Evaluate and align staff time/resources/position descriptions with strategic needs</p> <p><b>#2:</b> Evaluate Board position descriptions and expertise/gaps</p> <p><b>#3:</b> Evaluate buildings and grounds to identify maintenance needs</p> <p><b>#4:</b> Monitor and engage in national industry trends and best practices</p>

# IX. Conclusion

# X. Additional Information

# Connecting Older Adults in Weld County to Everything



Mission Statement: To offer older adults the opportunity to maintain their physical, emotional, and mental health while living independently.