Strategic and Sustainability Planning

The Idaho Caregiver Alliance Experience
What is the Idaho Caregiver Alliance?

• A statewide coalition of 1,500 individuals, organizations and agencies who come together to support, empower, and advocate for unpaid family caregivers in Idaho

• Began in 2014 as Idaho’s Lifespan Respite Coalition with funding from the Lifespan Respite Grant awarded to the Idaho Commission on Aging by the Administration on Community Living

• Organized under the umbrella of the Center for the Study of Aging at Boise State University
Operating Principles

VISION - Caregivers and their care recipients are valued and recognized as integral to Idaho's sustainable, thriving, holistic communities

VALUES - Collaboration, communication, inclusiveness and capacity building for family caregivers

MISSION - To serve as the voice, convener, and catalyst for support of unpaid family caregivers across the lifespan.
Which is it?

Strategic Planning

• a tool to help set priorities, determine data needs, focus resources and ensure that all stakeholders are working toward common goals and outcomes

• provides a roadmap for identification and development of initiatives/programs required to improve caregiver health and wellbeing and considers both short and long-term goals.

Sustainability Planning

• outlines steps to continue the efforts over time, and focuses stakeholders on successfully meeting objectives and fulfilling the mission and vision of the collaboration.

• steps may include stakeholder support, pooling/coordinating skills and respective organizational assets, operational infrastructure, financial and human resources, leadership transition plan, and guidelines to allow for flexibility/changes as needed.

A sustainability plan can either be embedded within the strategic plan or developed separately.
ICA Strategic Plan

**PURPOSE:** To provide the guidance and structure for the ICA to set and achieve its goals for informing and supporting Idaho family caregivers.

**METHODOLOGY FOR DEVELOPMENT AND USE**

- Originally developed through facilitated interactive planning meetings with key stakeholders in 2016; revised for 2020-2024
- Four broad goals allow flexibility and adjustment
- Included a goal for sustainability achievement
- Based on information gathered through regional respite summits and respite needs survey
- Used as a tool to manage initiatives and opportunities
- Annually reviewed for relevance and strategic achievements; timelines and tactics added in work plan
- Shared with partners to explain the ICA and its work; available on our website

Link to 2016-2020 Plan: [LINK](LINK)

Link to 2020-2024 Plan: [LINK](LINK)
Example 1

Caregivers and their care recipients are valued and recognized as integral to Idaho’s sustainable, thriving, holistic communities.

Vision

Values

Focus Areas

Objective (5)

Performance Indicators

Statewide Network of Information & Support Navigators

- # of outreach materials developed/disseminated
- # of presentations made
- # of navigators trained
- # of caregivers reached

- # of caregivers expressing
  - Decreased depression
  - Decreased stress
  - Increased knowledge
  - Decreased identity discrepancy

From How to Write A Strategic Plan: The Cascade Model (Executestrategy.net); [LINK](http://www.executestrategy.net)
IDaho Caregiver Alliance Logic Model

**Inputs**

- **Local**
  - ICA Leadership & Executive Team
  - Partnerships/Relationships
  - Caregivers
  - Stakeholders
  - Non-profit Agencies and Organizations
  - University-based supports
  - Volunteers
  - Coalitions, councils, commissions
  - ICA Mission and Vision
  - ICA Action Plan
  - ICA Work Plan
  - Research, Models, & Tools
  - Professional Development

- **State**
  - Funding from ICOA Lifespan Respite Grant
  - Matching funds from ICOA and Boise State
  - Policy Makers and State-level Leaders
  - State advocates Champions

**Activities**

- Engage in activities that:
  - Ensure a streamlined, coordinated system of supports for caregivers across the lifespan, recognizing the unique needs of Idaho’s diverse population (G1)
  - Promote increase public awareness about unpaid family caregiver and help people within our communities identify as caregivers (G2)
  - Recognize the importance of family caregiving embed the voice of family caregivers in policy and systems change (G3)

**Short Term Outcomes**

- Change in awareness, knowledge, and attitudes realized through:
  - Identification and promotion of statewide respite resources
  - Training opportunities for family caregivers, respite providers, service agents, and caregivers are promoted
  - Materials/services that meet needs of Idaho’s diverse population
  - Use of culturally appropriate information and resources designed for caregivers across the lifespan
  - Recognition of family caregivers in the workplace
  - Partnerships with an array of organizations and agencies
  - Partnerships with service organizations assure coordinated care and system supports
  - Communication with policy makers and employers
  - Media portrays the life of a family caregiver
  - Normalize caregiving through messaging and advocacy
  - Development of resources specific to faith-based organizations and employers
  - Active participation on committees and coalitions that engage with family caregivers across the lifespan

**Intermediate Outcomes**

- Change in behaviors and systems realized through:
  - Implementation of a statewide consumer-directed respite program
  - Implementation of a pilot Caregiver Navigator Program
  - Multi-sector collaboration to address caregiver needs
  - Revision of state policies related to supports for family caregivers
  - Revision of HR policies and supports for employees who are caregivers
  - Advocacy for family caregivers by health care systems and other organizations
  - Recognition of organizations that embrace a “caring” culture
  - Recognition of ICA as the statewide voice of the family caregiver

**Long Term Outcomes**

- A workforce of trained care providers is available and accessible to provide supports, respite and backup to family caregivers
- Primary care, long-term care, and behavioral health systems value the family caregiver
- Employment opportunities and tax policies support families
- Implementation of a No Wrong Door system of resources for caregivers across the lifespan
- Caregiver’s voice and perspective heard and used to guide policy and funding decisions
- Sustainability of ICA assured through use of a public and private funding model

Advanced wellbeing of caregivers through collaboration that improves access to quality supports and resources including respite for family caregivers across the lifespan.
ICA Sustainability Plan

**PURPOSE:** To increase awareness of and encourage investment in the work of the Idaho Caregiver Alliance

**METHODOLOGY FOR DEVELOPMENT AND USE**

- Sustainability included as a goal in the Strategic Plan
- Early sustainability efforts:
  - research into models
  - development/distribution of information on accomplishments (Example: [LINK](#))
  - strategizing with partners and education of policymakers
- Current sustainability has been achieved through ACL/ICOA funds but ICOA may not be seeking a 4th Lifespan Respite grant
- Recent process utilizes a consultant to guide the process to develop a business plan and based on
  - development of focus areas identified by Leadership Team (policymakers, healthcare systems, foundations)
  - information gathered through interviews and focus groups with key stakeholders
    - focus shifted based on learnings from stakeholders
  - demonstration of capacity for innovation as evidenced by Family Caregiver Navigation Project
  - emphasis on the value of the ICA as a catalyst for policy development and change outside of public system siloes
MURAL - a tool for analyzing findings and audience segments

Here is what we heard from interviewees re the value they experience/want to experience from the FCN broken up by customer segments.

Value Proposition
What value do your beneficiaries, customers and funding stakeholders, experience through the FCN? What value do they want from the FCN? What problems is the FCN solving for? What needs is the FCN currently solving for?

Value

Pain Points

Support caregivers has a positive top-of-mind effect. Building community, compassion, and awareness that caregivers need support (and should participate in the FCN).

Partners (part of the FCN, current and potential referral agencies (case managers, discharge nurses, social workers, and others to embed FCN in their processes)

Value

Circle of support - a tool for analyzing findings and audience segments

Building community compassion, and awareness that caregivers need support (and should participate in the FCN).

The caregiver is part of the "circle of support" for the direct care recipient - recognize that the caregiver is part of the patients circle of support.

"When you build robust systems of care, when we are collaborating, we're creating healthier communities."

Limited resources in Spanish
Limited access topaid providers list of expertise and availability

Case managers, care managers and key players in helping with the process.

Circle of support (creating, participating)

Circle of support consisting of family members, patients, and other support systems.

Case manager, care managers, case managers, care managers, key players in helping with the process.
Example 2

Caregivers and their care recipients are valued and recognized as integral to Idaho's sustainable, thriving, holistic communities.

**Vision**

**Values**

**Focus Areas**

**Strategic Plan**

Goal (4)

**Performance Indicators**

- Evidence of capacity for innovation
  - Family Caregiver Navigation Project
  - Pilot of respite voucher
  - Delivery of virtual caregiver conference

- Evidence of catalyst for policy development and change outside of public system or age/condition-specific siloes

From *How to Write A Strategic Plan: The Cascade Model* (Executestrategy.net); [LINK](http://example.com)
Thank You and Questions

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