

# STRATEGIC PLAN

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# THREE YEAR PLAN

July 1st, 2019 through  
June 30th, 2022

The National Indian Council on Aging

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# COMMUNICATION

**To Enhance Communications and Cooperation with Community Service Providers and Other Aging Organizations that Represent and Advocate for American Indian and Alaska Native Elders.**



## COMMUNICATION

**Objective One:** To develop a media package for use by Board Members, staff, and community members to communicate mission, goals, and activities of the National Indian Council on Aging by June 30<sup>th</sup>, 2020.

#	Activity	Lead Position	Start Date	End Date
1.1	Research different media package.	Communication Team	Q3 2019	Q2 2020
1.2	Identify NICOA's audiences.	Management Team	Q3 2019	Q2 2020
1.3	List materials NICOA has or is currently employing.	Communication Team	Q3 2019	Q2 2020
1.4	Enter list data into a spreadsheet based on topic, departments, audience, etc.	Administration	Q3 2019	Q2 2020
1.5	In a small group, analyze the effectiveness of each current or past media package piece to include when and where it was used, audience demographics, etc.	Management Team	Q3 2019	Q2 2020
1.6	Bring together all information from media package research and group analysis and decide which materials will work best for our audiences.	Management Team	Q3 2019	Q2 2020
1.7	Create sample media package(s) for each audience.	Communication Team	Q3 2019	Q2 2020
1.8	Present sample media packages to NICOA staff and Executive Director.	Communication Team	Q3 2019	Q2 2020
1.9	Edit based on feedback.	Administration	Q3 2019	Q2 2020



## COMMUNICATION (continued)

**Objective One:** To develop a media package for use by Board Members, staff, and community members to communicate mission, goals, and activities of the National Indian Council on Aging by June 30<sup>th</sup>, 2020.

1.10	Present for final approval from Executive Director.	Administration	Q3 2019	Q2 2020
1.11	Submit final media package to Board of Directors for review, recommendations, and approval.	Executive Director	Q3 2019	Q2 2020
1.12	Finalize media package based on recommendations from the Board of Directors and Executive Director.	Administration	Q3 2019	Q2 2020
1.13	Develop list of individuals and strategic partners, in addition to Board Members and staff, to get media package.	Management Team	Q3 2019	Q2 2020
1.14	Reproduce final media package and disseminate based on approved list.	Administration	Q3 2019	Q2 2020
1.15	Review media package annually and update to reflect changes throughout the year.	Management Team	Q3 2019	Q2 2020

## COMMUNICATION

**Objective Two:** To provide information to 1,200 American Indian and Alaska Natives through presentations at twelve (12) gatherings of elders, one in each of the National Indian Council on Aging regions, by June 30<sup>th</sup>, 2020.

#	Activity	Lead Position	Start Date	End Date
2.1	Layout calendar of elder gatherings.	Communications Team	Q3 2019	Q2 2020
2.2	Decide what information to provide. Information needs to build relationships and grow membership and engagement (example: a summary of NICOA's future, newsletter signup sheets).	Management Team	Q3 2019	Q2 2020
2.3	Research agenda of gatherings to tailor media package accordingly.	Communications Team	Q3 2019	Q2 2020
2.4	Submit to Executive Director for approval.	Administration	Q3 2019	Q2 2020
2.5	Decide best ways to distribute information (examples: one-on-one, mail, partnerships, presentations, videos, etc.).	Management Team	Q3 2019	Q2 2020
2.6	Develop a process to secure feedback on the information provided at the gatherings and engage the elders in development of future information sharing.	Communications Team	Q3 2019	Q2 2020
2.7	Develop and implement a system for evaluating the effectiveness of the information provided at each of the gatherings.	Communications Team	Q3 2019	Q2 2020
2.8	Revise methods and contents of information shared based on feedback from the elders and evaluation.	Communications Analyst	Q3 2019	Q2 2020
2.9	Prepare quarterly reports for the Board of Directors and the Executive Director on the information shared with the elders.	Administration	Q3 2019	Q2 2020

## COMMUNICATION

**Objective Three:** To develop an implementation plan to expand the outreach to American Indians and Alaska Natives through electronic, paper, and public media by June 30<sup>th</sup>, 2020.

#	Activity	Lead Position	Start Date	End Date
3.1	Research how NICOA currently communicates with elders.	Communications Team	Q3 2019	Q2 2020
3.2	Analyze data concerning communication preferences from conference needs assessment.	Communications Team	Q3 2019	Q2 2020
3.3	Create a spreadsheet with methods identified.	Communications Team Administration	Q3 2019	Q2 2020
3.4	In a small group, analyze effectiveness of each method of outreach.	Communications Team	Q3 2019	Q2 2020
3.5	Use findings from group discussion to formulate plan.	Communications Team	Q3 2019	Q2 2020
3.6	Determine which media outlet(s) to focus on for outreach.	Communications Team	Q3 2019	Q2 2020
3.7	Present findings to Executive Director.	Communications Team	Q3 2019	Q2 2020
3.8	Based on recommendations and approval from the Executive Director, develop an implementation plan to expand outreach to AI/NA elders.	Communications Team	Q3 2019	Q2 2020

## COMMUNICATION

**Objective Four:** To secure representation by the Administration on Aging Title VI programs to the National Indian Council on Aging Board of Directors by December 31, 2019.

#	Activity	Lead Position	Start Date	End Date
4.1	Develop an announcement about the opening of a seat on the NICOA board of directors for a representative from the Title VI directors.	Communications Team	Q3 2019	Q4 2019
4.2	Email the announcement to all Title VI directors with a link to a form they can fill out if they would like to be considered for the board of directors' position.	Administration	Q3 2019	Q4 2019
4.3	Based on the Title VI directors who respond positively to being considered for a board position, send out another email to allow Title VI directors to vote for who they would like to fill the board position.	Administration	Q3 2019	Q4 2019
4.4	Repeat every time the board position's term expires.	Administration	Ongoing	Ongoing

## COMMUNICATION

**Objective Five:** To support the establishment and re-establishment of two (2) State Indian Councils on Aging each year for the next three years for a total of six (6) new fully functional State Indian Councils on Aging by June 30<sup>th</sup>, 2022

#	Activity	Lead Position	Start Date	End
5.1	Research previously existing councils and who serves Indian Elders.	Communications Team Administration	Q3 2019	Q2 2022
5.2	Create a spreadsheet identifying each category of Councils on Aging (example: Native or non-Native ages of participants, locations, services provided, population demographics, etc.).	Communications Team Administration	Q3 2019	Q2 2022
5.3	Identify gaps in locations and services provided to the aging population.	Communications Team Administration	Q3 2019	Q2 2022
5.4	Create a plan of what NICOA can do to fill gaps based on research and present to Executive Director.	Communications Team	Q3 2019	Q2 2022
5.5	Once approved, create a plan of action to gain access to those locations to provide services.	Communications Team	Q3 2019	Q2 2022
5.6	Base plan of action on receptiveness, demographics, needs, etc.	Communications Team	Q3 2019	Q2 2022
5.7	Center plan of action on leading an establishment of new NICOA partnerships.	Communications Team	Q3 2019	Q2 2022
5.8	Research why previously existing Indian Councils on Aging failed.	Communications Team	Q3 2019	Q2 2022



## COMMUNICATION (continued)

**Objective Five:** To support the establishment and re-establishment of two (2) State Indian Councils on Aging each year for the next three years for a total of six (6) new fully functional State Indian Councils on Aging by June 30<sup>th</sup>, 2022

#	Activity	Lead Position	Start Date	End
5.9	Create spreadsheet to determine active participation in other Councils on Aging.	Communications Team Administration	Q3 2019	Q2 2022
5.10	Create checklist.	Communications Team Administration	Q3 2019	Q2 2022
5.11	Gather all information about existing NICOA's partnerships with Councils on Aging.	Communications Team	Q3 2019	Q2 2022
5.12	Add those to council spreadsheet.	Communications Team Administration	Q3 2019	Q2 2022
5.13	Create a survey to send to partners rating NICOA's effectiveness in their organization.	Communications Team	Q3 2019	Q2 2022
5.14	Get Executive Director approval for survey.	Executive Director	Q3 2019	Q2 2022
5.15	Once approved, send to council representatives.	Communications Team Administration	Q3 2019	Q2 2022
5.16	Create a spreadsheet using survey data, questions, results, etc.	Communications Team Administration	Q3 2019	Q2 2022
5.17	Analyze data to determine where NICOA needs to improve its partnership with other Councils on Aging.	Communications Team Administration	Q3 2019	Q2 2022

**COMMUNICATION** (continued)

**Objective Five:** To support the establishment and re-establishment of two (2) State Indian Councils on Aging each year for the next three years for a total of six (6) new fully functional State Indian Councils on Aging by June 30<sup>th</sup>, 2022

#	Activity	Lead Position	Start Date	End
5.18	Present findings to NICOA.	Communications Team	Q3 2019	Q2 2022
5.19	Based on survey and research data, create a partnership agreement tailored specifically for each new and current partnership developed by NICOA.	Communications Team Administration	Q3 2019	Q2 2022
5.20	Create an accountability checklist to use as an audit for NICOA's partnership effectiveness.	Communications Team Administration	Q3 2019	Q2 2022

## COMMUNICATION

**Objective Six:** To analyze, design, and implement a comprehensive electronic communication system June 30<sup>th</sup>, 2022.

#	Activity	Lead Position	Start Date	End
6.1	Research what electronic communications is.	Communications Team Administration	Q3 2019	Q2 2022
6.2	Research and choose the best communication sources.	Communications Team Administration	Q3 2019	Q2 2022
6.3	Analyze each audience and which sources fit best with each audience (elders, supporters, funders, donating public, etc.).	Communications Team Administration	Q3 2019	Q2 2022
6.4	Develop a website that appeals to each audience.	Communications Team Administration	Q3 2019	Q2 2022
6.5	Establish which communication avenues we will follow based on research, and what specific communication strategy will be used.	Communications Team Administration	Q3 2019	Q2 2022
6.6	Give all research to date to Executive Director for approval.	Communications Team Administration	Q3 2019	Q2 2022
6.7	Research return on investment of paid social media advertising for NICOA (cost, audience interest, greatest amount of readers, etc.).	Communications Team Administration	Q3 2019	Q2 2022
6.8	Give all research to date to Executive Director for approval.	Communications Team Administration	Q3 2019	Q2 2022
6.9	Re-rank communication sources using paid sites before free ones.	Finance	Q3 2019	Q2 2022

## COMMUNICATION (continued)

**Objective Six:** To analyze, design, and implement a comprehensive electronic communication system  
June 30<sup>th</sup>, 2022.

#	Activity	Lead Position	Start Date	End
6.10	If research determines that the return on investment is advantageous, post already made advertisements from short-term goals into paid sites altering as needed for proposed audiences.	Communications Team Administration	Q3 2019	Q2 2022
6.11	Repeat step 10 with free communication sources.	Communications Team Administration	Q3 2019	Q2 2022
6.12	Create spreadsheet to enter and analyze data.	Communications Team Administration	Q3 2019	Q2 2022
6.13	Use data to drive social media communication.	Communications Team Administration	Q3 2019	Q2 2022
6.15	Present all data to date to Executive Director for approval and discuss future endeavors.	Communications Team	Q3 2019	Q2 2022

## COMMUNICATION

**Objective Seven:** To write and produce three (3) National and Regional Public Service Announcements designed to educate the general population about the issues impacting American Indian and Alaska Native Elders by June 30<sup>th</sup>, 2022.

#	Activity	Lead Position	Start Date	End
7.1	Research Public Service Announcements (PSAs) and secure training in PSA production for staff.	Communications Team	Q3 2019	Q2 2022
7.2	Determine the desired impact of the PSA.	Communications Team	Q3 2019	Q2 2022
7.3	Identify and then research PSA topics that fit with NICOA's mission (for regional and national audiences).	Communications Team	Q3 2019	Q2 2022
7.4	Research and choose target audiences.	Communications Team	Q3 2019	Q2 2022
7.5	Based on research, choose most viable topics that affect those target audiences.	Communications Team	Q3 2019	Q2 2022
7.6	Research best formats for PSAs.	Communications Team	Q3 2019	Q2 2022
7.7	Identify tv, radio, and other outlets that would air PSA.	Communications Team	Q3 2019	Q2 2022
7.8	Research legal issues on topics identified for PSAs, both regional and national.	Communications Team	Q3 2019	Q2 2022
7.9	Identify production companies and the cost to produce a PSA.	Communications Team	Q3 2019	Q2 2022

## COMMUNICATION (continued)

**Objective Seven:** To write and produce three (3) National and Regional Public Service Announcements designed to educate the general population about the issues impacting American Indian and Alaska Native Elders by June 30<sup>th</sup>, 2022.

#	Activity	Lead Position	Start	End
7.10	Present findings to executive director and await approval.	Communications Team	Q3 2019	Q2 2022
7.11	If approved, identify a mentor (business or individual) to support the development and production of PSA(s).	Communications Team	Q3 2019	Q2 2022
7.12	Research script outlets.	Communications Analyst	Q3 2019	Q2 2022
7.13	Create a proposal of PSA topic, including audience (national or regional), format, distribution source, specifics of accomplishment, partners, etc.	Communications Team	Q3 2019	Q2 2022
7.14	Present proposal to executive director for approval.	Communications Team	Q3 2019	Q2 2022
7.15	Produce PSA.	Communications Team	Q3 2019	Q2 2022
7.16	Present to NICOA staff.	Communications Team	Q3 2019	Q2 2022
7.17	Gather feedback.	Administration	Q3 2019	Q2 2022
7.18	Edit based on feedback.	Administration	Q3 2019	Q2 2022



**COMMUNICATION** (continued)

**Objective Seven:** To write and produce three (3) National and Regional Public Service Announcements designed to educate the general population about the issues impacting American Indian and Alaska Native Elders by June 30<sup>th</sup>, 2022.

#	Activity	Lead Position	Start	End
7.19	Present finished PSA to executive director for approval.	Communications Team	Q3 2019	Q2 2022
7.20	Distribute.	Administration	Q3 2019	Q2 2022
7.21	Evaluate if the targeted impact of the PSA was achieved.	Communications Team	Q3 2019	Q2 2022
7.22	Based on results of evaluation, repeat using another format and/or topic.	Communications Team	Q3 2019	Q2 2022
7.23	Develop a process and evaluate the effectiveness of PSAs on a quarterly basis.	Communications Team	Q3 2019	Q2 2022

## COMMUNICATION

**Objective Eight:** To analyze the feasibility of establishing State Indian Councils on Disabilities by June 30<sup>th</sup>, 2022.

#	Activity	Lead Position	Start Date	End Date
8.1	Define “feasibility”.	Communications Team	Q3 2019	Q2 2022
8.2	Define “disability” as defined by the American with Disabilities Act.	Communications Team	Q3 2019	Q2 2022
8.3	Research organizations that already have programs for people with disabilities and create spreadsheet of data.	Communications Team	Q3 2019	Q2 2022
8.4	Research each organization and gather information on how they operate (costs, focus, effectiveness, etc.).	Communications Team	Q3 2019	Q2 2022
8.5	Research each organization’s outreach efforts to NICOA’s core base and add data to spreadsheet.	Communications Team	Q3 2019	Q2 2022
8.6	Analyze spreadsheet data and look for gaps in coverage for Native people with disabilities.	Communications Team	Q3 2019	Q2 2022
8.7	Take all information thus far and meet with the executive director and NICOA staff to discuss: gaps in coverage, organizations assisting Native communities, the costs of other programs, where and how NICOA would fit, and the ability of NICOA to staff and fund the advocacy of Natives with disabilities, etc.	Communications Team	Q3 2019	Q2 2022
8.8	Decide whether adding “disability” to NICOA’s efforts would be feasible and plan accordingly.	Management Team	Q3 2019	Q2 2022
8.9	Submit recommendation to NICOA Board of Directors.	Executive Director Communications Team	Q3 2019	Q2 2022

# NATIONAL CENTER OF EXCELLENCE

To Provide Information and Technical Assistance for Native American Communities to Improve Health Care for American Indian and Alaska Native Elders. Also, to Serve as a Clearinghouse for Information on Issues Affecting American Indian and Alaska Native Elders.



## NATIONAL CENTER ON EXCELLENCE

**Objective One:** To develop the framework for the National Center of Excellence.

#	Activity	Lead Position	Start Date	End Date
1.1	Survey Tribal leaders, elder program directors, and support service providers on the needed focus areas for the proposed National Center of Excellence (NCE).	Executive Director	Q3 2019	Q3 2019
1.2	Survey the NICOA Board of Directors and key informants on the needed focus areas for the proposed NCE.	Executive Director National Center on Excellence Team	Q3 2019	Q3 2019
7.3	Analyze the data collected to determine the potential focus areas for the proposed NCE.	National Center on Excellence Team	Q4 2019	Q4 2019
7.4	Research the existing resources available that provide leadership, best practices, research, training, and support in each of the potential focus areas identified.	National Center on Excellence Team	Q1 2020	Q1 2020
7.5	Based on the survey and research determine if there is a need for NICOA to establish a National Center of Excellence.	Executive Director National Center on Excellence Team	Q2 2020	Q2 2020
7.6	If it is determined that there is a need, based on the survey and research identify the role(s) NICOA will target for each of the focus areas. The potential roles include repository, leadership, best practices, research, training, and support.	Executive Director Board of Directors	Q2 2020	Q2 2020
7.7	If it is determined that there is a need, based on the survey and research, prioritize the focus areas and roles.	Executive Director Board of Directors	Q2 2020	Q2 2020

## NATIONAL CENTER ON EXCELLENCE

**Objective Two:** To establish a training program and accredited curriculum for American Indian and Alaska Native service providers.

#	Activities	Lead Position	Start Date	End Date
2.1	Identify educational institutions, partners, and subject matter experts in the field of American Indian and Alaska Native Elder Services.	Executive Director Center of Excellence Team Education Partners	Q1 2020	Q2 2022
2.2	Develop processes for programs and areas identified in the survey and by the educational institutions, partners, and subject matter experts.	Center of Excellence Team	Q1 2020	Q2 2022
2.3	Implement processes for programs identified by the survey, subject matter experts, educational institutions, and partners.	Executive Director Center of Excellence Team Education Partners	Q1 2020	Q2 2022
2.4	Meet with University Leaders and subject matter experts to assist with establishing training program and curriculum for service providers, staff, and program managers	Executive Director Center of Excellence Team	Q1 2020	Q2 2022
2.5	Develop learning objectives and performance outcomes for each of the subject areas.	Center of Excellence Team Educational Partners	Q1 2020	Q2 2022
2.6	Write the curriculum and training materials for each of the subject areas.	Center of Excellence Team Education Partners	Q1 2020	Q2 2022
2.7	Plan training schedule for service providers, staff, and program managers	Executive Director Center of Excellence Team	Q1 2020	Q2 2022
2.8	Conduct Training	Trainers	Q1 2021	Q2 2022

# ADVOCACY AND EDUCATION

To Provide Information, Reports and Expert Testimony Requested by Tribal Nations and the United States Congress.





## ADVOCACY AND EDUCATION

**Objective One:** To identify existing advocacy and education materials and assess current relevancy by June 30<sup>th</sup>, 2020.

#	Activities	Lead Position	Start Date	End Date
1.1	Gather all advocacy and education literature from NICOA Library and staff.	Administration Communications Team	Q3 2019	Q 2-2020
1.2	Create an excel spreadsheet that describes each piece of information. Examples:	Administration Program Managers	Q3 2019	Q 3-2020
	a. Title			
	b. Topic/Issue			
	c. When created			
	d. Identified as education or advocacy			
	e. The target audience for the information			
	f. Purpose			
1.3	In a small group of NICOA staff, discuss each piece related to advocacy/education literature shown in excel spreadsheet and identify/record the following information:	Administration Advocacy and Education Team	Q3 2019	Q 2-2020
	a. When last used?			
	b. Who used it?			
	c. Who was it presented to?			
	d. Who did it help and how do you know?			
	e. Is the topic/issue still relevant today?			
	f. Other			
1.4	Create a small-group of NICOA members, (staff, board members, subject matter experts) and brainstorm Elder needs. Record information.	Education and Advocacy Team Subject Matter Experts	Q3 2019	Q 2-2020

1.5	Cross reference those Elder needs with the excel spreadsheet that shows what education and advocacy literature NICOA currently possesses. a. Does the material NICOA currently has address those Elder needs?	Administration Advocacy and Education Team	Q3 2019	Q 2-2020
1.6	Update spreadsheet with additional information explaining each materials relevancy.	Administration	Q3 2019	Q 2-2020
1.7	Identify new materials that need to be created for advocacy and education.	Advocacy and Education Team	Q3 2019	Q 2-2020
1.8	Present findings to Executive Director.	Advocacy and Education Team	Q3 2019	Q 2-2020
1.9	Decide if materials should be edited, revised, eliminated, and/or updated to meet Elder needs.	Executive Director Advocacy and Education Team	Q3 2019	Q 2-2020

## ADVOCACY AND EDUCATION

**Objective Two:** To conduct two meetings with Tribal Leaders and American Indian and Alaska Native Elders to secure input and support for the advocacy and education efforts of NICOA by June 30<sup>th</sup>, 2020.

#	Activities	Lead Position	Start Date	End Date
2.1	Determine the best audience, AI/AN Elders Program Directors or AI/AN elders, to survey to determine the highest priority issues impacting the elders.	Executive Director Advocacy & Education Team	Q3 2019	Q 3-2019
2.2	Based on the decision in activity 2.1. design a survey for the audience selected to determine the issues impacting the elders and priority of each issue.	Advocacy & Education Team Communications Team	Q3 2019	Q 3-2019
2.3	Conduct the survey and prepare a report of survey findings for the Board of Directors, Executive Director and staff.	Advocacy & Education Team Communications Team	Q4 2019	Q4 2019
2.4	Using the survey data and the areas approved for NICOA's future advocacy efforts, create a plan for the advocacy campaign, advocacy materials and handouts for each area selected.	Advocacy & Education Team Communications Team	Q1 2020	Q1 2020
2.5	Give draft campaign plan, advocacy materials, and handouts, to a small-group of NICOA staff and ED to gain feedback.	Advocacy & Education Team Communications Team	Q1 2020	Q1 2020
2.6	Edit, revise, and or redo campaign, advocacy materials, and handouts based on feedback.	Administration	Q1 2020	Q1 2020
2.7	Identify a focus group of Tribal leaders and create a survey that will allow tribal leaders to give feedback after they are shown the proposed advocacy campaign, advocacy materials and handouts. Examples:	Advocacy & Education Team Communications Team	Q1 2020	Q1 2020
	a. Does the information reflect their community needs?			

	b. Recommendations for the campaign, materials, and handouts.			
	c. Would the Tribe support NICOA's current and future advocacy efforts?			
	d. If yes, what actions can the Tribe take to support?			
2.8	Give revised advocacy materials and handouts to small-group of NICOA staff and ED. Then give them the created survey to fill out as a way to:	Advocacy & Education Team Communications Team	Q1 2020	Q1 2020
	a. Gain feedback for all parts-advocacy materials, handouts, focus group results.			
	b. Revise any portion if needed			
2.9	Schedule meeting with tribal leaders and key Elders to outline the advocacy campaign, give advocacy materials, handouts, and results of focus group.	Executive Director Advocacy & Education Team	Q2 2020	Q2 2020
	a. Decide if this will be done for a group or an individual tribal leader.			
	b. Decide if this will be done in-person, Skype, or another form of communication.			
2.10	Give presentation and secure feedback from the Tribal leaders and key elders.	Executive Director Board of Directors	Q2 2020	Q2 2020
2.11	Create an excel spreadsheet to store the input from Tribal leaders and key elders. Can be used for:	Administration	Q2 2020	Q2 2020
	1. Revising current advocacy campaign and materials			
	2. Documenting commitments from Tribal leaders to support the advocacy campaign(s)			
	3. Providing support to Tribal leaders committed to the campaign.			
	4. Creating new advocacy materials			
2.12	Select the next group of Tribal leaders to replicate the presentation made to the first group of Tribal leaders with adjustments learned from the first presentation.	Advocacy & Education Team Communications Team	Q2 2020	Q2 2020
2.13	Implement campaign and provide support to Tribal leaders supporting the campaign.	Communications Team	Q2 2020	Q2 2020

## ADVOCACY AND EDUCATION

**Objective Three:** To develop six (6) fact sheets for advocacy and education that address the issues of the American Indian and Alaska Native Elders.

#	Activities	Lead Position	Start Date	End Date
3.1	Research different types of fact sheet samples.	Advocacy & Education Team Communications Team	Q2 2020	Q2 2020
3.2	Using inspiration from researched factsheet samples, create 3+ sample NICOA factsheet templates.	Advocacy & Education Team Communications Team	Q2 2020	Q2 2020
3.3	Present sample fact sheet templates to Executive Director and/or group of NICOA staff and decide which ones to use for NICOA: Each fact sheet should have identical:	Advocacy & Education Team Communications Team	Q2 2020	Q2 2020
	1. Font			
	2. Colors			
	3. Format			
	4. NICOA Emblem			
5. ETC...				
3.4	Get approval on which kind of factsheet template NICOA will be using.	Management Team Executive Director	Q2 2020	Q2 2020
3.5	Based on the advocacy issues selected in objective 2 prepare advocacy campaign plan to be supported by fact sheets.	Communications Team	Q2 2020	Q2 2020
3.6	Take results of meeting to Executive Director for final approval of campaign plan and areas of issues to be researched.	Advocacy & Education Team Communications Team	Q2 2020	Q2 2020
3.7	In same small-group, come to an agreement on what it means to find <i>valid</i> and <i>relevant</i> information.	Communications Team	Q2 2020	Q2 2020

3.8	With approval; research each topic and/or issue by gathering and recording all relevant/valid information in an excel spreadsheet.	Communications Team	Q2 2020	Q2 2020
3.9	Using the data collected, begin creating a factsheet using the agreed upon template.	Communications Team	Q2 2020	Q2 2020
3.10	Share sample factsheets with NICOA staff and Executive Director to elicit ideas, edits, revisions, etc.	Communications Team	Q2 2020	Q2 2020
3.11	Make necessary changes to factsheets and give to Executive Director for final approval.	Administration	Q2 2020	Q2 2020



## ADVOCACY AND EDUCATION

**Objective Four:** To develop and implement an organizational infrastructure that supports advocacy and education to address the issues of the American Indian and Alaska Native Elderly by June 30<sup>th</sup>, 2022.

#	Activities	Lead Position	Start Date	End Date
4.1	Define <i>structured Advocacy</i>	Advocacy & Education Team	Q1- 2020	Q1 2020
4.2	Develop a protocol and procedures for identifying areas to move forward with an advocacy campaign.	Advocacy & Education Team	Q1 2020	Q1 2020
4.3	Consult with a lawyer to identify the legalities of what NICOA can and cannot do as a not-for-profit organization.	Advocacy & Education Team	Q1 2020	Q1 2020
4.4	Research elder issues already on the books and being discussed, voted on, looked at, in local, state, and federal government offices.	Advocacy & Education Team	Q2 2020	Q4 2022
4.5	Record that data into an excel spreadsheet and be sure to note state, date, legislative proposal, etc.	Advocacy & Education Team	Q2 2020	Q4 2022
4.6	Analyze the data to discover who is or would be affected by the current or new legislation.	Advocacy & Education Team	Q2 2020	Q4 2022
4.7	Record that data into the excel spreadsheet.	Advocacy & Education Team	Q2 2020	Q4 2022
4.8	Prepare a report quarterly for the Executive Director on each of the issues identified.	Advocacy & Education Team	Q2 2020	Q4 2022
4.9	Follow the procedures for moving forward on each of the issues identified.	Advocacy & Education Team	Q2 2022	Q4 2022

# PARTNERSHIPS

To Network with Appropriate Agencies to Maximize Resources and Increase the Efficiency and Effectiveness of the Service Delivery Systems for American Indian and Alaska Native Elders.



## PARTNERSHIPS

**Objective One:** To develop protocol and procedures for development and management of NICOA's partnerships.

#	Activities	Lead Position	Start Date	End Date
1.1	Establish a written procedure for recommending potential partnerships to NICOA Administration	Partnership Team Administration	Q3 2019	Q3 2019
1.2	Develop a standard NICOA Partnership agreement to be used with all partners and the protocol for the initiating and entering into the partnership.	Partnership Team Administration	Q3 2019	Q3 2019
1.3	Develop Master Template and Database System for Researching Current and Potential Partnerships	Administration	Q3 2019	Q3 2019
1.4	Identify a shared location for staff to access partnership database.	Administration	Q3 2019	Q3 2019
1.5	Train staff development team to research current and potential partnerships (all) and use database.	Partnership Team Administration	Q3 2019	Q3 2019
1.6	Create recurring monthly reminder for staff to update partner database.	Administration	Q3 2019	Q3 2019
1.7	Prepare and Present monthly report for Executive Director and staff development team.	Partnership Team Administration	Q3 2019	Q3 2019

## PARTNERSHIPS

**Objective Two:** To gather information about all past and potential partners and assess benefits to NICOA, American Indian and Alaska Native Elders, and Persons with Disabilities through the partnership by December 31<sup>st</sup>, 2019.

#	Activities	Lead Position	Start	End
4.1	Conduct Asset Mapping to identify potential partners that can support the mission of NICOA.	Partnership Team	Q3 2019	Q2 2019
4.2	Research all partner opportunities.	Partnership Team Admin	Q3 2019	Q1 2020
4.3	Prepare an informational sheet on each potential partner which details the resources the partner brings to NICOA, the resources NICOA can provide to the potential partner, and the time commitment of NICOA staff to maintain and manage the partnership.	Partnership Team Admin	Q3 2019	Q1 2020
4.4	Instruct all staff to begin entering all potential partner info into database.	Admin	Q3 2019	Q1 2020
4.5	Send bi-weekly reminders to all staff to update information and list.	Admin	Q3 2019	Q1 2020
4.6	Create quarterly report for Executive Director.	Partnership Team Admin	Q2 2019	Q1 2020

## PARTNERSHIPS

**Objective Three:** Prioritize organizations, businesses, medical facilities, funding agencies, and educational institutions for engaging in partnerships by March 31<sup>st</sup>, 2020.

#	Activities	Lead Position	Start	End
3.1	Develop workgroup to review partnerships and benefits	Executive Director Management Team	Q1 2020	Q2 2020
3.2	Create a schedule of meetings	Work Groups	Q1 2020	Q2 2020
3.3	Breakdown list into benefit categories: resources the partner provides to NICOA and NICOA resources that would be committed to the partnership	Communications Team Admin	Q1 2020	Q2 2020
3.4	Establish a list of existing partners and recommendations to continuing the partnership, expanding the partnership responsibilities, or terminating the partnership. Submit recommendations to the Executive Director.	Communications Team Admin	Q1 2020	Q2 2020
3.5	Establish a prioritized list of potential new partnerships and the basis for the recommendation. Submit recommendations to the Executive Director	Communications Team Admin	Q1 2020	Q2 2020

## PARTNERSHIPS

**Objective Four:** Establish five (5) functional partnerships by June 30<sup>th</sup>, 2020.

#	Activities	Lead Position	Start	End
4.1	Based on the final decision of prioritized organizations, businesses, and individuals identify staff personnel to initiate contact with the potential partner.	Management Staff	Q2 2020	Q2 2020
4.2	Using the established protocol initiate communication with the potential partner to discuss each partners responsibilities of the partnership.	Partnership Team	Q2 2020	Q2 2020
4.3	Fully execute a partnership agreement.	Executive Director Admin	Q2 2020	Q2 2020
4.4	Inform all NICOA staff of the new partnership and to begin recording information in the partnership data base of activities with the partners.	Management Team	Q2 2020	Q2 2020



## PARTNERSHIPS

**Objective Five:** Develop and implement the infrastructure to manage existing partnerships and initiate new partnerships by June 30<sup>th</sup>, 2022.

#	Activities	Lead Position	Start Date	End Date
5.1	Conduct Quarterly Research and Reports for Potential Partners	Partnership Team	Q1 2020	Q2 2022
5.2	Follow the approved protocol for recommending Potential Partners to the Executive Director.	Management Team	Q1 2020	Q2 2022
5.3	If approved follow the established protocol for establishing a new partnership for NICOA	Administration	Q1 2020	Q2 2022
5.4	Schedule Meetings/Calls with potential partners to discuss relationship, resources NICOA can provide to the partner, and resources the partner can provide to NICOA	Executive Director Administrati	Q2 2020	Q2 2022
5.5	Follow the established protocol for entering into a Partnership Agreement and secure a fully executed Partnership Agreement.	Executive Director Administrati	Q2 2020	Q2 2022
5.6	Review and report on existing partners quarterly to confirm benefits are being utilized or determine if there are new benefits offered or that NICOA could provide to the partner.	Partnership Team Administratio	Q3 2020	Q2 2022
5.7	Conduct an annual recognition event for partners to recognize their contribution to the mission of NICOA.	Management Team	Q4 2020	Q2 2022

# SUSTAINABILITY

To Develop and Secure Resources and Assets that will Support and Expand the Activities which Align with the Mission of the National Council on Aging.



## SUSTAINABILITY

**Objective One:** To analyze the current organizational budget to determine what adjustments are appropriate, submit to Executive Director, and make approved changes by September 30<sup>th</sup>, 2019.

#	Activities	Lead Position	Start Date	End Date
1.1	Obtain current and past organizational budgets.	Finance	Q3 2019	Q3 2019
1.2	Review each line of the budget and staffing patterns to determine what costs can be cut and realignment of staffing patterns.	Finance	Q3 2019	Q3 2019
1.3	Present identified cuts, realignment of staff responsibilities and projected savings to the Executive Director.	Executive Director Finance	Q3 2019	Q3 2019
1.4	Determine how any identified line item cuts will be implemented.	Executive Director Finance	Q3 2019	Q3 2019
1.5	Implement the proposed budget and staffing changes.	Administration Finance	Q2 2019	Q2 2020
1.6	Conduct monthly meetings to review impact of changes and make appropriate adjustments.	Administration Finance	Q2 2019	Q2 2020

## SUSTAINABILITY

**Objective Two:** To secure \$500,000 in Federal and foundation funding to support and expand services by June 30<sup>th</sup>, 2020.

#	Activities	Lead	Start Date	End Date
2.1	Develop Master Template and data base system for researching funding sources.	Resource Development Team	Q3 2019	Q3 2019
2.2	Train Staff on the researching of potential funding sources.	Resource Development Team	Q3 2019	Q3 2019
2.3	Research potential federal funding sources and enter into database.	Resource Development Team	Q3 2019	Q2 2020
2.4	Secure membership in the foundation center for researching foundation and corporate funding.	Finance	Q3 2019	Q3 2019
2.5	Research potential foundation and corporate funding and enter into databases.	Resource Development Team	Q3 2019	Q2 2020
2.6	Prepare monthly financial report for Executive Director and resource development team.	Finance	Q4 2019	Q2 2020
2.7	Conduct monthly meeting to review potential funding sources and prepare report of recommend potential funding sources.	Resource Development Team	Q4 2019	Q2 2020

2.8	Prepare report of recommended potential funding sources to submit to Board of Directors.	Resource Development Team	Q4 2019	Q2 2020
2.9	Submit to Board of Directors and Secure approval to move forward.	Resource Development Team	Q4 2019	Q2 2020
2.10	Prepare Grant/Contract Proposals and submit.	Resource Development Team	Q4 2019	Q2 2020
2.11	Analyze Evaluation of proposal by funding source and maintain data base of strengths and weaknesses.	Resource Development Team	Q4 2019	Q2 2020

## SUSTAINABILITY

**Objective Three:** To secure \$200,000 in financial support from Tribes by June 30<sup>th</sup>, 2020.

#	Activities	Lead Position	Start Date	End Date
3.1	Develop outreach (marketing) package for securing support for the operations of NICOA.	Communications Team	Q3 2019	Q4 2019
3.2	Survey Board Members to identify potential opportunities for securing support from Tribes through individual meetings and representation at conferences.	Sustainability Team	Q3 2019	Q4 2019
3.3	Identify Tribes that have established philanthropic programs within overall operations.	Sustainability Team	Q3 2019	Q4 2019
3.4	Research the identified Tribes areas of interest for giving.	Sustainability Team	Q3 2019	Q4 2019
3.5	Assess the current relationship NICOA and/or Board Members have with Tribes.	Sustainability Team	Q3 2019	Q4 2019
3.6	Prioritize potential opportunities for meeting with Tribes and conferences.	Sustainability Team	Q3 2019	Q4 2019
3.7	Develop individual strategies for each Tribe and submit to Board of Directors for approval.	Sustainability Team	Q3 2019	Q4 2019
3.8	Prepare a budget for each of the meetings and conference attendance to ensure resources available for the activity.	Finance	Q4 2019	Q1 2020

3.9	Submit recommendations to Board of Directors of Tribes and conferences to be targeted and cost to request support.	Sustainability Team	Q4 2019	Q1 2020
3.10	Based on recommendations and approval from the Board of Directors establish a calendar for meeting with Tribes and representation at conferences by the Board Member and Executive Director	Sustainability Team	Q4 2019	Q1 2020
3.11	Confirm participation by Board Member.	Sustainability Team	Q4 2019	Q1 2020
3.12	Prepare individual talking points for the Board Member and Executive Dir.	Sustainability Team	Q4 2019	Q1 2020
3.13	Schedule meetings	Sustainability Team	Q1 2020	Q2 2020
3.14	Conduct ten (10) meetings or conference attendance to introduce and/or reacquaint Tribes with the work of NICOA and request support.	Sustainability Team	Q1 2020	Q2 2020
3.15	Develop a schedule for follow up activities with each of the Tribes after the meetings or Tribes that demonstrated interest in supporting NICOA at conference.	Sustainability Team	Q2 2020	Q2 2020
3.16	Monitor the effectiveness of each approach and prepare reports for the Board of Directors at the Board of Director meetings.	Sustainability Team	Q1 2020	Q2 2020

## SUSTAINABILITY

**Objective Four:** To establish a for-profit subsidiary company to support the mission of the organization by June 30<sup>th</sup>, 2022.

#	Activities	Lead Position	Start Date	End Date
4.1	Identify the services and/or goods that NICOA could provide through a for profit business.	Administration	Q1 2020	Q1 2020
4.2	Research viable for-profit corporation models to support the mission of NICOA and align with the services and/or goods identified above.	Administration	Q1 2020	Q1 2020
4.3	Among those, choose the top 3 For-profit corporation models that would be best for NICOA	Administration	Q1 2020	Q1 2020
4.4	Gather information about each of the 3 for-profit models, including marketing methods and feasibility issues	Administration	Q1 2020	Q1 2020
4.5	Present findings to NICOA staff and Executive Director	Administration	Q2 2020	Q2 2020
4.6	Choose a model most appropriate to NICOA	Administration	Q2 2020	Q2 2020
4.7	Approach the chosen business to establish a mentoring relationship.	Administration	Q3 2020	Q3 2020
4.8	Conduct a feasibility study to determine the viability of the business.	Administration	Q4 2020	Q4 2020
4.9	Based on the feasibility study, write a business plan.	Administration	Q1 2021	Q3 2021
4.10	Work with the appropriate outside agencies and attorneys to choose the name, get a tax ID number, open bank account(s) and file the appropriate registration (and any other administrative) paperwork	Finance	Q3 2020	Q4 2020
4.11	Based on the business plan secure capital requirements.	Finance	Q4 2021	Q4 2021



4.12	Hire personnel (if necessary) and initiate business operations.	Administration	Q1 2022	Q2 2022
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## SUSTAINABILITY

**Objective Five:** To establish a for-profit subsidiary company to support the mission of the organization by March 31<sup>st</sup>, 2022.

	Activities	Lead Position	Start Date	End Date
5.1	Choose a business model most appropriate for NICOA, to determine the correct size of building.	Administration	Q3 2020	Q4 2019
5.2	Research and decide on the appropriate size and type of building that meet the minimum requirements for the NICOA headquarters.	Administration	Q3 2020	Q4 2019
5.3	Research and decide on the appropriate location for the building, whether or not to be located in NICOA's home city	Administration	Q3 2020	Q4 2019
5.4	Identify and secure the services of advisors to assist with assessing the viability of purchasing commercial real estate.	Administration	Q4 2020	Q1 2021
5.5	Research the commercial office space market projections for the next ten years in Albuquerque, NM	Administration	Q4 2020	Q1 2021
5.6	Research the current city five-year plan for development by each geographic area.	Administration	Q4 2020	Q1 2021
5.7	Identify surplus properties available through city, state, and federal government.	Administration	Q4 2020	Q1 2021
5.8	Identify private businesses that have idle office buildings.	Administration	Q1 2021	Q2 2021
5.9	Identify potential properties.	Administration	Q1 2021	Q2 2021
5.10	Research the cost of the building and develop a budget and cash flow projections for each of the potential properties.	Finance	Q1 2021	Q2 2021

5.11	Develop a financing plan which includes private support, potential grants, government backed low interest loans, commercial lending, and/or private investors.	Finance	Q2 2021	Q2 2021
5.12	Conduct a feasibility study to determine the viability of owning and/or leasing a building	Administration	Q3 2021	Q4 2021
5.13	Research and determine whether the building will be owned/leased by the for-profit business or the non-profit	Administration	Q3 2021	Q4 2021
5.14	Write an executive summary for each of the potential properties that have been determined feasible and submit to the Board of Directors for appropriate action.	Administration	Q3 2021	Q4 2021
5.15	Perform due diligence on the property selected to include a building condition assessment, environmental site assessment, and history of liens or other obligations.	Administration	Q4 2021	Q1 2022
5.16	Based on the decision of the Board of Directors develop a full business plan for the property selected and submit to the Board of Directors.	Administration	Q4 2021	Q1 2022

## SUSTAINABILITY

**Objective Six:** To develop a plan, budget and potential resources to become the leading advocacy group for American Indian and Alaska Natives veterans and disabled elders by March 31<sup>st</sup>, 2022.

#	Activities	Lead Position	Start Date	End Date
6.1	Conduct a study to identify other advocacy organizations that work to support American Indian and Alaska Native veterans and the disabled.	Administration	Q3 2020	Q4 2020
6.2	Assess the impact of each of the advocacy organizations.	Administration	Q4 2020	Q1 2021
6.3	Research the activities, operations, and funding of the top five advocacy organizations.	Administration	Q4 2020	Q1 2021
6.4	Identify one or more advocacy organizations to serve as a mentor for NICOA and propose a mentoring partnership with the organization(s) identified.	Administration	Q1 2021	Q2 2021
6.5	Conduct a feasibility study to determine the benefit of having a Washington, D.C. presence.	Administration	Q1 2021	Q2 2021
6.6	Secure legal advice to determine if NICOA should establish a 501( c)(6) organization for all advocacy efforts or model one of the organizations identified in activity 6.1	Administration	Q1 2021	Q2 2021
6.7	Create a plan based on information secured from the above activities.	Administration	Q2 2021	Q3 2021
6.8	Create a budget and identify potential resources based on research conducted in activity 6.1.	Finance	Q2 2021	Q3 2021
6.9	Submit the plan and accompanying budget to the Board of Directors for review, recommendations, and approval.	Administration	Q3 2021	Q4 2021

6.10	If approved by the Board of Directors secure the resources for the expanded advocacy by NICOA.	Administration	Q4 2021	Q1 2022
6.11	Once the resources are secured, implement the plan approved by the Board of Directors.	Administration	Q1 2022	Q2 2022
6.12	Evaluate the effectiveness of the advocacy efforts quarterly and implement adjustments based on the evaluation.	Administration	Q2 2022	Q2 2022