

The Center for Advocacy for the Rights and Interests of the Elderly (CARIE) 2008-2011 Strategic Plan

Executive Summary

The Center for Advocacy for the Rights and Interests of the Elderly (CARIE) is a non-profit organization, based in Philadelphia, dedicated to improving the quality of life for vulnerable older people.

CARIE fulfills its core mission — **to improve the well being, rights and autonomy of older persons through advocacy, education, and action** — through a “case to cause” model of advocacy that serves to promote equal access to justice and addresses problems and issues on both the individual and the systemic levels. Because frail older adults often lack the ability to advocate on their own behalf without assistance, CARIE provides individual advocacy through direct service and systemic advocacy through education and public policy initiatives.

Setting CARIE apart from others in the aging field is its sole focus on advocacy through a comprehensive array of activities, community education programs, professional training and consultation, and referral using a client-centered approach. CARIE’s unique advocacy model helps not only the individual client but many others through its work to inform policy-makers, education programs targeted at providing information and improving the ability of those who help frail older adults to give quality care.

CARIE’s programs and services include community education, professional training, and individual counseling and problem solving. A leader in the field of aging for more than 25 years, CARIE is recognized as a vital resource for a wide range of audiences, including older adults, family members and other caregivers, aging and other social service providers, policy makers, and academicians. Its services are provided locally, throughout the Commonwealth of Pennsylvania and in some cases nationally.

CARIE is committed to providing high quality programming and sound management practices.

Specific outcomes include advocacy, education, and action:

- *Advocacy:* Each year, Our CARIE LINE Advocates assist approximately 2,700 care recipients and resolve more than 3,000 problems annually. Staff and volunteers present educational programs and participate in enrollment fairs, together which reach 3000-4000 people annually. Through our Long-Term Care Ombudsman Program, we help 100+ consumers annually. An additional 500+ persons are provided with information and consultation. Finally, staff and volunteers visit 650+ residents in various long-term care facilities in order to train many staff, residents and the public about residents’ rights.
- *Education:* Each year 29,000 people are educated through 200+ public outreach programs staff presentations, health fairs. In all, in addition to the many educational programs provided through CARIE’s various programs, the training department conducted 14 training programs reaching more than 500 social workers, nurses, administrators, and other professionals in long-term care. The project launched its newsletter, Frontline Care distributed to 3,000 DCWs.

- *Action:* CARIE advocates around issues that impact frail older adults including efforts to: prevent federal and state budget cuts particularly those associated with Medicaid and Medicare; make the Medicare Part D more seamless for consumers; increase funding for long term care services; prevent the privatization of Medicaid Aging Waiver services; prevent the loss of funding for services for older victims; promote revisions to the PA Department of Aging's OPTIONS cost sharing policy; remove barriers and increase access to home and community-based services; ensure approval of improved personal care home regulations in Pennsylvania (These new regulations will expand resident rights, increase staff training and improve fire safety among other improvements.); and, allow consumers to "age in place" in PA by advocating for assisted living legislation.

CARIE undertook in a strategic planning process in March, 2008 with the following objectives:

- A renewed vision, including a case statement around advocacy
- A road map – a simple, practical plan that provides guidance and clarity for making decisions across the organization
- Strengthened fundraising approaches
- Improved means by which to measure success, including better documentation of the position impact of CARIE's advocacy work
- Skill development in the area of planning
- Alignment among the board, staff, volunteers and funders

The major questions considered through this planning process include:

- Who are we? What is the face and verbiage of CARIE? What is our brand and how can we most effectively use it to increase impact?
- Who should CARIE target as clients in the coming years?
 - o Poor and elderly, or all elderly?
 - o Geographic scope?
 - o Funders- are they clients or providers?
 - o Caregivers- how to address the potential for conflict between the caregiver and the elderly.
- Which products or services should CARIE offer the target clients?
 - o What are the intersections of needs and abilities?
 - o What does "good" look like?
 - o What are our key business objectives and vision?
- How should CARIE go about this?
 - o What is our development strategy (all encompassing)?
 - o How can we generate unrestricted operating funds?
 - o How can CARIE get recognition to attract funders?
 - o How do we maintain our objectivity and individuality?
 - o How do we do all that we do, yet with so little funding?

Our work was informed by a broad range of stakeholders, externally and internally, through interviews, focus groups, and the Core Capacity Assessment Tool (CCAT). We took a deep look at our past and present, as well as external drivers, to arrive at an analysis of external opportunities and threats, alongside CARIE's strengths and weaknesses. This enabled us to create a vision for the future, and to align on our shared values. With this in hand, we created the higher-level goals and supporting strategies needed to move solidly towards this vision in the coming three years. Finally, we identified the leadership roles that will be critical to success.

Mission, Vision and Values

Mission

CARIE fulfills its core mission — **to improve the well being, rights and autonomy of older persons through advocacy, education, and action** — through a “case to cause” model of advocacy that serves to promote equal access to justice and addresses problems and issues on both the individual and the systemic levels. Because frail older adults often lack the ability to advocate on their own behalf without assistance, CARIE provides individual advocacy through direct service and systemic advocacy through education and public policy initiatives.

We are different from other agencies—we do not provide direct services (home care, meals, transportation); we advocate for people to get those services and advocate for dignity and quality care for older people. We work to make sure that everyone finds some resolution to their problem.

Vision

As we look to the future, there are many challenges. The safety net for older adults—one with flaws—is facing imminent threats. Our nation's expenditures on Medicare and Medicaid (essential programs for the elderly) are “over the top.” We have heard that Social Security must change—a potential threat to generations ahead. As we see changes to respond to these problems—the system becomes even more difficult to understand. CARIE is there for older adults to help them understand and navigate this ever more difficult system of services, and to help make a system that is more responsive to the needs of those who use it.

CARIE's vision for the future is:

CARIE is regarded as the leading advocate in behalf of older adults across Pennsylvania and beyond. CARIE's work has contributed to healthier, safer, and more dignified lives for older adults from all socioeconomic, racial and cultural backgrounds.

Furthermore:

Seniors are empowered to live autonomously for as long as they choose or can feasibly do so and there is a system locally, statewide and nationally that includes:

- A system that prevents the abuse and neglect of older adults
- There are strict prohibitions and prosecution of individuals/entities who abuse, neglect and/or commit crimes against elders
- A clear path for elders and caregivers to find the help and guidance they need regardless of the issue
- Ample options throughout the LTC system that allow seniors to find programs that are not only appropriate and responsive to their needs but also fiscally available without great sacrifice
- We have sound funding and resources to support the development of programs and tools responsive to community needs, including communities of differing cultures and socioeconomic means.
- As an independent non-profit corporation CARIE is broadly viewed as an expert, we advise all levels of government and maintain agility to be responsive to the needs and concerns of the communities we serve.

Values

In carrying out CARIE's mission to improve the lives, well-being and autonomy of older adults, CARIE's Board and Staff are committed to upholding the following values:

- *To act with INTEGRITY*
- *To advocate for the EMPOWERMENT of the individual*
- *To work for social JUSTICE*
- *To support SELF-DETERMINATION*
- *To treat all individuals with RESPECT, COMPASSION, and DIGNITY*
- *To build COMMUNITY*

Goals and Strategies

The essence of strategy is to allocate scarce resources in a way best enables an organization to advance its mission. The strategic planning process has enabled us to make decision going forward according to the following goals and supporting strategies:

Goal 1: Ensure the ongoing success of ongoing core programs

Strategies:

- **Build a case statement and create supporting marketing materials that demonstrates the case to cause model and underscores CARIE's impact**
 - Direct client advocacy
 - Community education

- Professional training
- Policy advocacy
- **Integrate functional areas**
 - More effective staff meeting routines
 - Enhance board-staff interactions

Goal 2: Learn and Adapt for greater impact and capacity:

Strategies:

- **Increase awareness and use of services and knowledge**
 - Increase the volume of calls to the CARIE LINE
 - Establish the CARIE Cyber-School
- **Identify and fill critical service gaps**
 - Care transition, other?
- **Secure funding for research**
 - Identify and fill knowledge gaps

Goal 3: Professionally market CARIE's services

- **Develop and implement a strategic fundraising program**
 - Detail the goals- size, characteristics and sources of funding
 - Define the target opportunities and methodologies
 - Equip and enroll the entire organization
- **Develop marketing tools and approaches**
 - Annual education / outreach routines
 - Branding
 - Fee for Service

Goal 4: Staff for success and develop individuals and teams

Strategies

- **Board Development**
 - Refine committee structure and operation to ensure accountability and follow-through in implementing the strategy
 - Recruitment and training
- **Hire and develop individuals to implement the strategy**
- **Create a succession plan**

CARIE's board has established a strategic positioning committee and reviews its plan at each board and at its various committee meetings.