



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 to 2020-2024 Plan: [LINK](#)

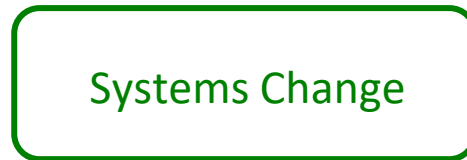
Example 1



Vision



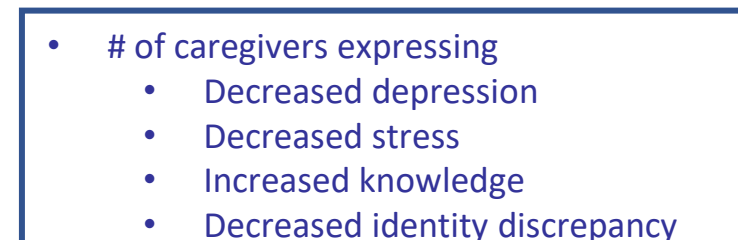
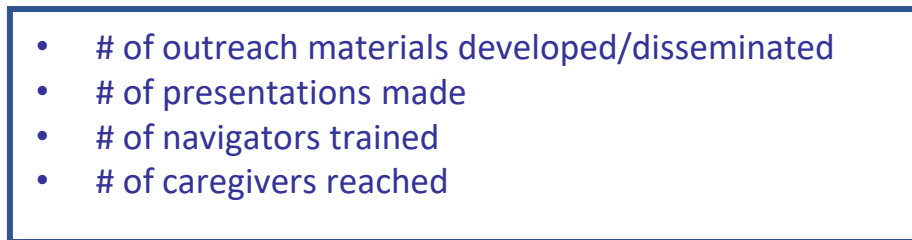
Values



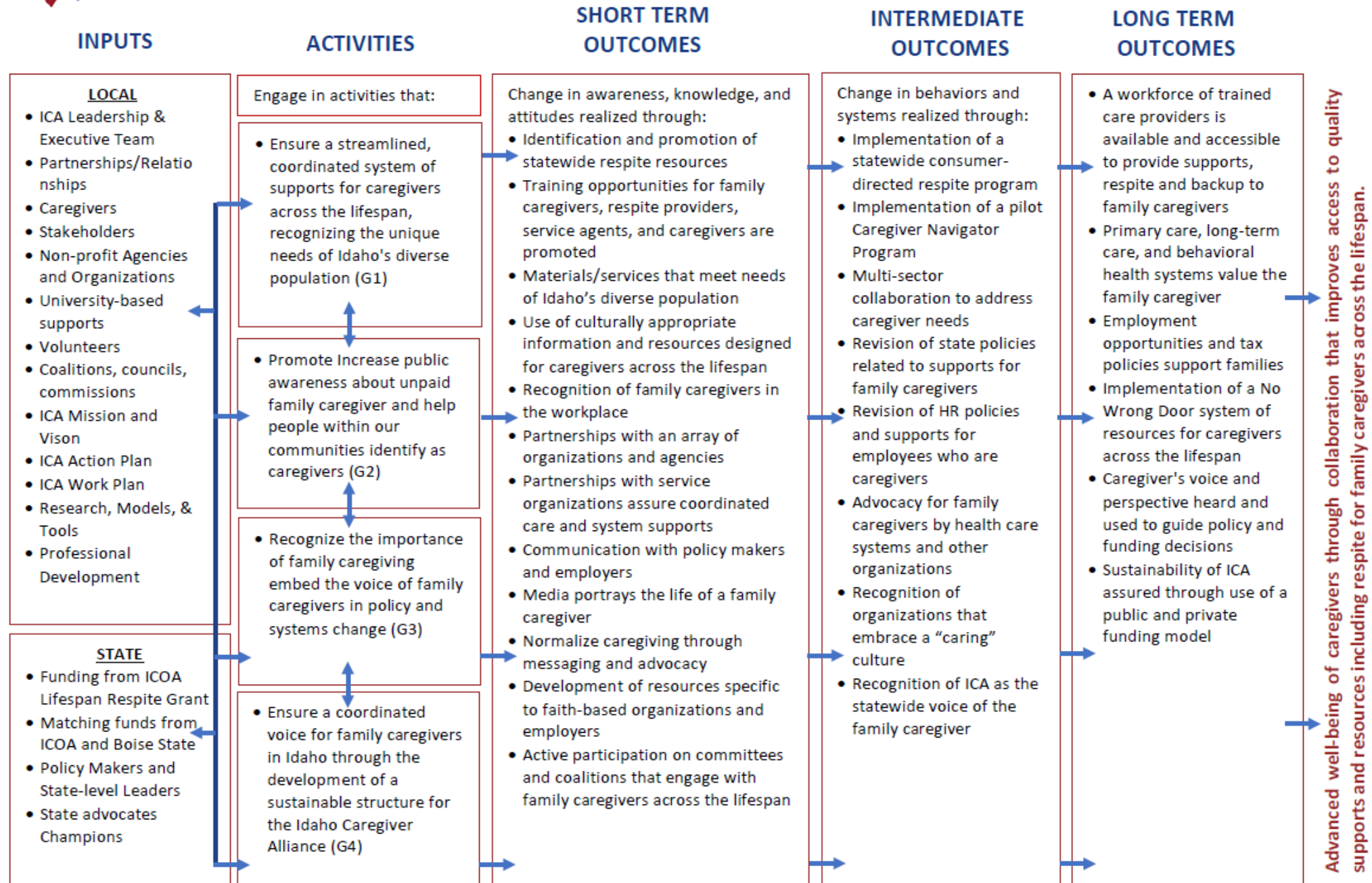
Focus Areas



Objective (5)



Performance Indicators



ICA Sustainability Plan

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

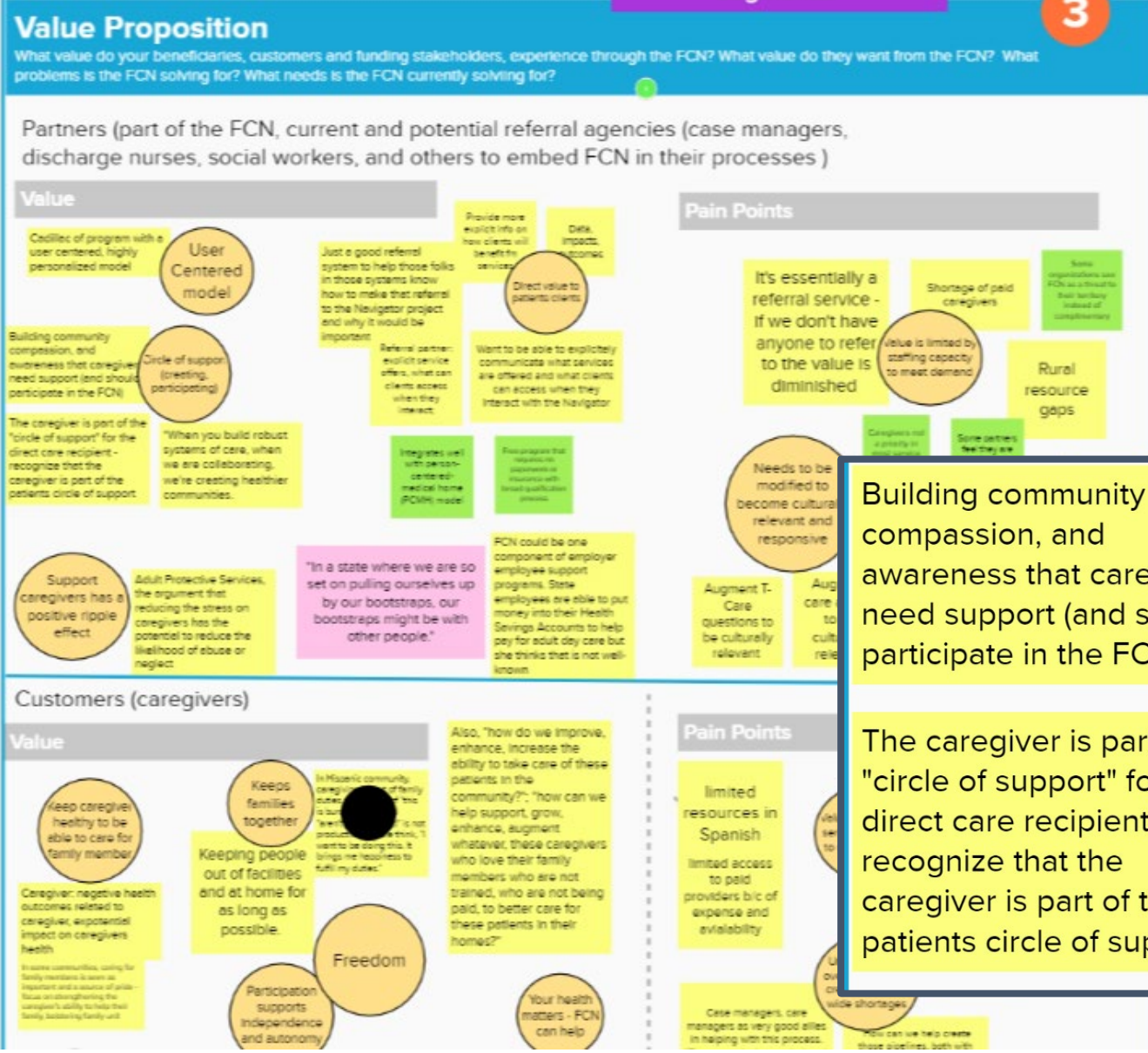
METHODOLOGY FOR DEVELOPMENT AND USE

- 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

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

3

MURAL - a tool for analyzing findings and audience segments



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

Circle of support (creating, participating)

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

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

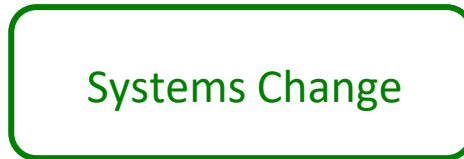
Example 2



Vision



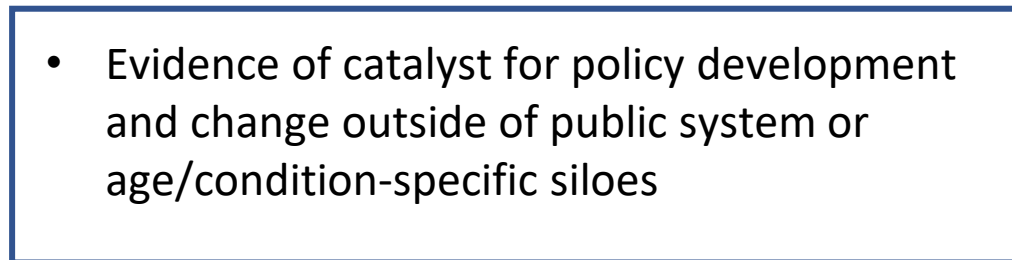
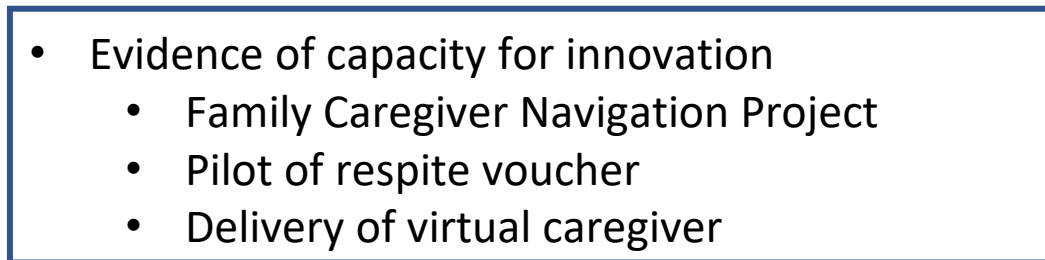
Values



Focus Areas



Strategic Plan Goal (4)



Performance Indicators

conference

Thank You and Questions



Sarah Toevs, PhD, Director, Center for Study of Aging, Boise State University
stoevs@boisestate.edu

Marilyn Sword, Coordinator, Idaho Caregiver Alliance
frontiergroupidaho@gmail.com