STRATEGIC PLAN UPDATE

All Staff June 7th

Strategic Theme Products/Partnerships - Champion Jonathan Haag: Continue innovation pipeline w/refinements; mature and monetize products if able; reject non-starters.

- Postbook soft-launched Nov. 2022. Increased promotion beginning this summer. Recipient of 2023 USAGing Aging Achievement Award.
- Twain Health Inc, legally formed late-May 2023 & about 45 days out from soft launch
- 3 new concepts moved into ideation phase.
- Developing joint venture w/Area 3 to build a management services company called Community Care Hub of Indiana to serve as the contracting arm and provider network for mLTSS
- Joined JUSTUS properties preferred network
- UHC partnership/pilot – caregiver supports peer to peer model utilizing technology platform created by Emissary Health
- New partnership with Ascension St. Vincent Living PACE – contract signed as service provider when they open (w/in the next 45-60 days) see details of services in provider theme below.

Strategic Theme Provider Services – Champion – Michael Johnson: Understand, adapt and optimize to mLTSS (Pathways to Aging); launch dietary service

- Expansion into Delaware, Tipton and Madison counties for A&D Waiver CM services effective 1 May 2023 – total new clients: 3
- Launched Medical Nutrition Therapy via 1st-ever Medicare number under the Medical Directorship of Dr. Robert Russell – total clients seen: 1, for 2 sessions; considering multiple options to increase quality referrals
• Ongoing discussions and meetings with FSSA/OMPP & DA, Advancing States and MCEs to mitigate conflict of interest, ensure we are in MCE systems as HCBS providers and not vendors and approaching each for seed capital investment

• Set to provide nutrition counseling & transportation to Ascension St. Vincent PACE at 5435 W. Pike Plaza Rd, Indianapolis, near W. 38th St. and Lafayette Rd., when it opens its doors in the next 45-60 days. Contract is already signed and in place. Learn more about PACE [here](#) and view the PACE service area map [here](#).

**Strategic Theme Human Capital – Champion Denise Weathersbe:** Focus on expanded leadership academy, drive more employee engagement and morale and continue to develop DEIB initiatives

- Developing additional content for leadership academy based on feedback received
- Implemented Office Vibe tool across the agency to be able to receive feedback from staff and adjust in real time
- Overall employee satisfaction with CICOA is 8/10
- In final phases of pay equity project which will result in reviewing our compensation scale against the pay equity data & make any revisions needed

**Strategic Theme IT/Innovation – Champion Kelsey Stinson:** Build internal capabilities; prepare for mLTSS data environment

- Building our data team- we hired a Data Analyst, Rebecca Hailperin-Lausch, in March 2023 who has already made a significant impact on our data efforts. Plan to continue growing the team in FY24.
- Secured our own licensing to Tableau, a data visualization tool, and using Microsoft automation tools to increase efficiencies in running reports and visualizing data. It’s getting us closer to having access to data in real-time which leads to more efficient processes, allows for better business decisions to be made, allowing us to address gaps or unmet needs sooner.
- Set to launch our internal Data Governance Committee early in FY24 to ensure an ongoing commitment to the policies and processes that ensure the effective and efficient use of data to enable CICOA to achieve its goals.
One upcoming change related to this initiative is that the Data and Research team will be moving from the Foundation to the Compliance team.

**Strategic Theme Philanthropy – Champion Steve Gerber:** Develop major donor program & reevaluate fundraiser events for the future (*Moving toward corporate sponsorships for 2024*)

- Annual goal setting in Foundation to be segmented by activity/category
- Events Manager hired to assist w/current and future fundraisers
- Acuity Dart engagement identified various donor personas resulting in more strategic interactions with donors = meeting them based on their ‘why’
- Will begin sourcing the Major Gift Officer in 1st QTR SFY24
- Expansion of Faith Communities outreach
- Greater focus on what the purpose of a foundation is – Fundraising & Building Endowment.

**Strategic Theme Corporate Services- Champion Tauhric Brown:** Consolidate marketing and structure strategies, review branding, and continually assess how structure matches functions under mLTSS operating model

- Ensure CICOA Connect is the primary source for staff to get updates on what is going on across the agency – this will reduce the number of all-staff emails that are being sent by various leaders in the company
- Leverage The Circuit as the place to notify staff of new resources that have been posted to Connect.
- Develop segmented donor messaging based on their donor persona
- Review results of our first risk assessment & begin work plan to address and mitigate high risk areas identified from assessment
- Research and recommend the best approach to support marketing/advertising efforts needed for venture companies that will launch out of venture studio