

2026



# ICOA Internal Program and Project Specialist's Planning Manual

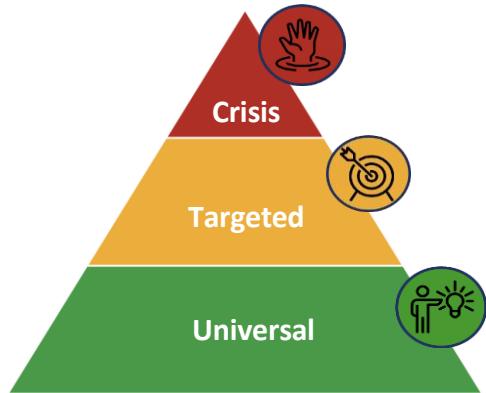
COME TO WORK TO CHANGE THE WORLD

JUDY B. TAYLOR

# Executive Summary

The Aging network's charge is to serve those most vulnerable to poor outcomes as they age. We do this through universal preventative, targeted at risk, and crisis services across the state. The quality of our programs and service delivery methods are crucial to ensure we support vulnerable and high-risk Idahoans to age safely and successfully wherever they chose to live. If we fail in our charge older and vulnerable Idahoans will suffer emotional and physical health consequences up to and including death. This makes what we do High Stakes.

Luckily, there are other High-Stake industries we can study to learn best practices and avoid pitfalls or failure. These industries include Nuclear Power, The U.S Armed Forces, Aviation, and Healthcare. During my 35 years in Healthcare, I studied and learned from all these examples in a never-ending quest to improve patient safety, treatment effectiveness, and a quality customer experience.



My Goal for the aging network is to duplicate the journey of these industries in becoming highly reliable, learning organizations. Because it is the right thing to do. Because the people we serve deserve it. Because we are all inspired by big goals. If you do not come to work each day planning to change the world, why bother?

One aspect of highly reliable organizations is that they use explicit and proven methodologies, relevant data, and broad stakeholder involvement in their planning and processes. They also frequently measure progress and report it transparently. Learning organizations are always planning to prevent failure and improve all aspects of their organization. They benchmark themselves against the best and learn from every success and failure.



It is time for our aging network to launch the next phase on our journey to best serve those in our care. The ICOA Planning Process stands as the new standard for all of us. The ICOA planning process is based on many others that have stood the test of time. Each phase includes best practices and tested tools that when used correctly lead to outcomes that can be trusted. Deliverables from each phase of the planning cycle will be linked to craft out AAA local, ICOA program, and ICOA agency state plans. ICOA will hold ourselves and our AAA partners to these standards.

Onward, the future is bright  
Judy Bicknell Taylor, RN, MSN

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## Introduction

To appropriately set the foundation for excellence, all staff must have a baseline set of **Knowledge, Skills, and Attitudes**. Although these are necessary entry level KSAs, ongoing improvement and mastery are also expected. Please consult with your supervisor on a professional development plan.

### General Knowledge:

- Normal human growth and development across the lifespan
- Psychology and Sociology principles related to human behavior
- Communication theory
- Public Health concepts
- Basic research methodology and statistics
- Basic civics or political science on state and federal level

### General Skills:

- Computer programs including Word, PowerPoint, Excel
- Public speaking and presentations
- Meeting facilitation
- Creating and presenting education
- Motivating and influencing others through change

### General Attitudes:

- Embody the ICOA mission, vision, and values
- Professionalism and engagement
- Proactiveness and long-range vision
- Empathy with diverse client groups
- Teamwork and shared success

Each planning phase will call out expectations where specialized KSAs are necessary. Again, please consult with your supervisor on a development plan if you believe you will be unable to fulfill the requirements.

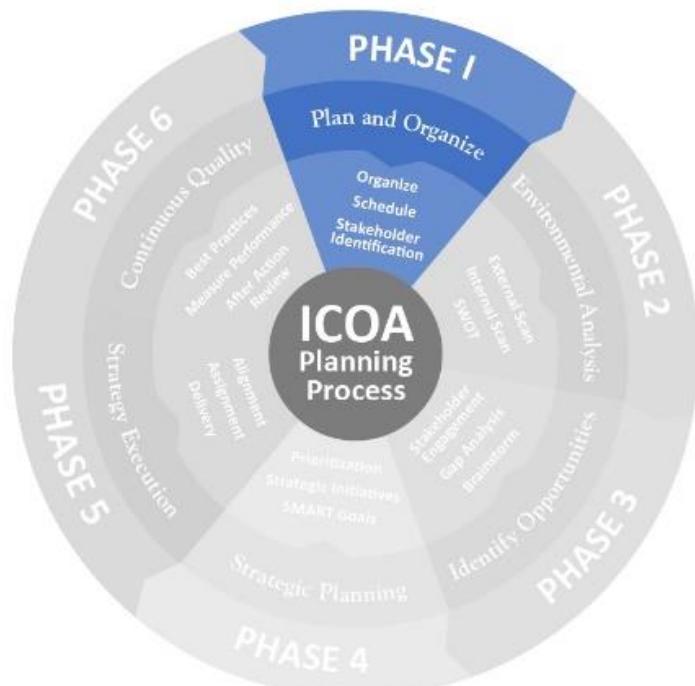
Additionally, in each planning phase, expectations call out the specialized KSAs required. These specialized KSAs encompass professionalism for all ICOA staff, with an emphasis on program development personnel. While not all KSAs directly apply to operational staff, they should still incorporate them with appropriate modifications. Again, If you anticipate challenges in meeting the requirements, please discuss a development plan with your supervisor.

## Phase One: Set Foundation and Organize

To be successful at ICOA you must adhere to all current standards and best practices while demonstrating strategic and forward thinking. Failure to plan, meet obligations, or be prepared is not an option.

### Planning Phase Specific Expectations

1. Model and promote all ICOA Program Manual standards. The Program manual contains the following pieces:
  - Policy and procedures
  - Technical guidance
  - Planning manual
  - Operations manual
  - Communication manual
2. Understand and follow state and federal planning, operations, reporting, and financial perpetual obligations. If you believe you are unable to meet any obligation by the due date, consult with the leadership team for problem-solving, as soon as possible but not less than two weeks, prior to the due date.



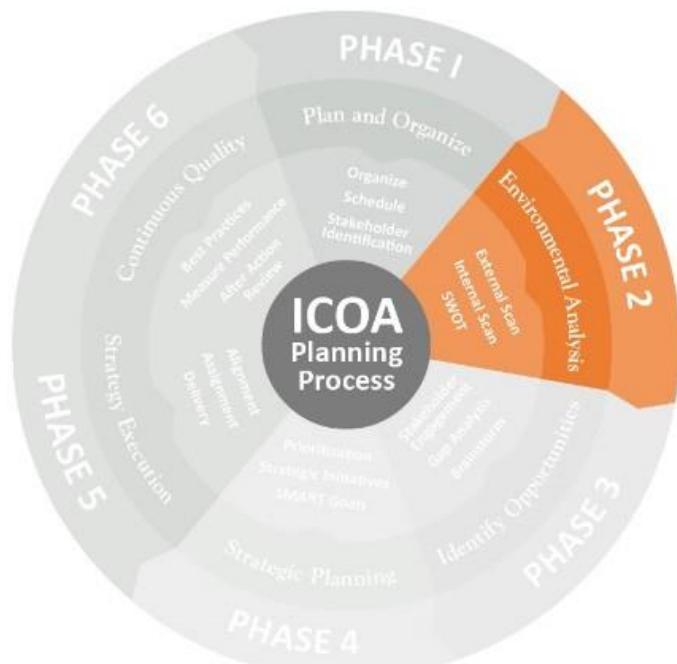
## Phase two: Environmental Analysis

You are the only expert at your job, and the only person promoting and improving your program on the state level. To position your program for success and growth you must understand the context and environmental factors that affect it. You must also understand any local modifications allowable on the AAA level, and when variation is not necessary and should be investigated.

Stakeholders, including clients receiving services are an invaluable tool to understand current programs SWOTs.

### Planning Phase Specific Expectations

1. Regular participation in state and national interest group meetings.
2. Regular reading of current literature related to your programs.
3. Ongoing personal education in areas that effect your programs and aging in general.
4. Ongoing evaluation of the SWOT areas of each AAA.
5. Continuous engagement with stakeholder and affinity groups.
6. Clarity in where your programs are not meeting best practices or are unprepared for the future.
7. Demonstrate familiarity with federal and state statute and rules that effect ICOA and your programs.
8. Demonstrate understanding of how the political processes and climate effect your work.

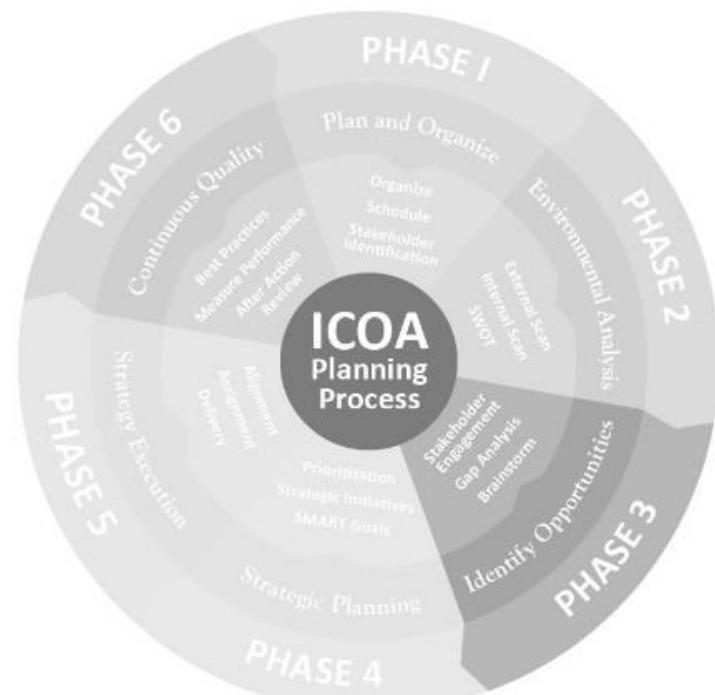


## Phase Three: Solution Formulation

Knowing where ICOA and the aging network is currently falling short of the ideal is not a failure, it is the necessary first step on the improvement journey. Honest and open conversation on all levels about gaps and opportunities is healthy and necessary.

### Planning Phase Specific Expectations

1. Continuous engagement with stakeholders. You must establish positive relationships that inspire AAA staff to want to excel in delivering your programs.
  - What is going well
  - What could be improved
  - What do we need to learn
  - What do we need to celebrate
2. Communication with ICOA leadership about gaps.
3. Positive brainstorming on all levels around possible solutions.
4. Evaluation and application of discretionary grants for complex program improvement.

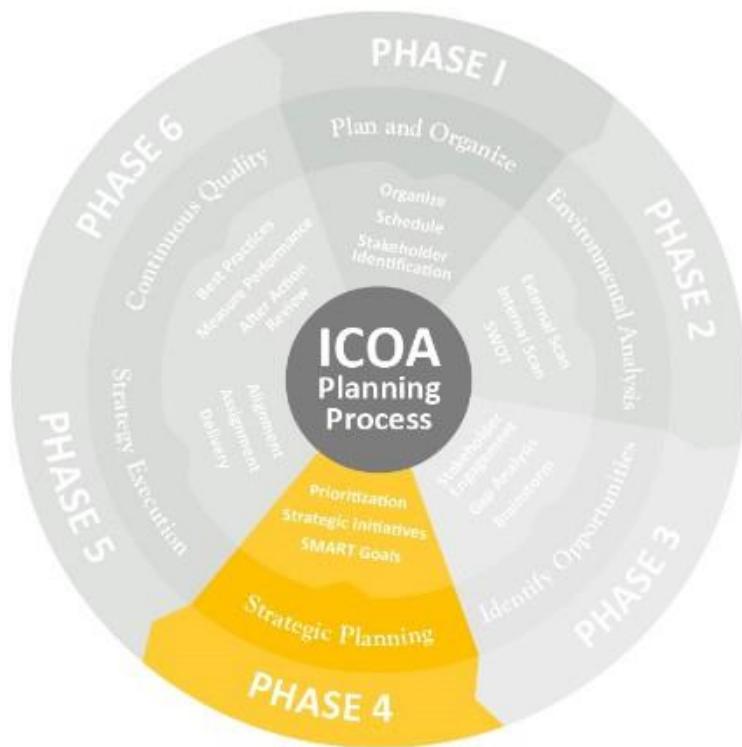


## Phase Four: Strategic Planning

ICOA is a planning agency. Every ICOA staff member on some level must be a skilled planner.

### Planning Phase Specific Expectations

1. Demonstrate understanding of ICOA's strategic vision and plan as a whole.
2. Articulate how your assigned programs contribute to overall success.
3. Identify crossover opportunities where two programs can work together to advance both.
4. Participate in ICOA planning processes.
5. Evaluate the sufficiency and effectiveness of AAA local planning efforts.
6. Evaluate the alignment of AAA strategic goals with the AAA spending plans.

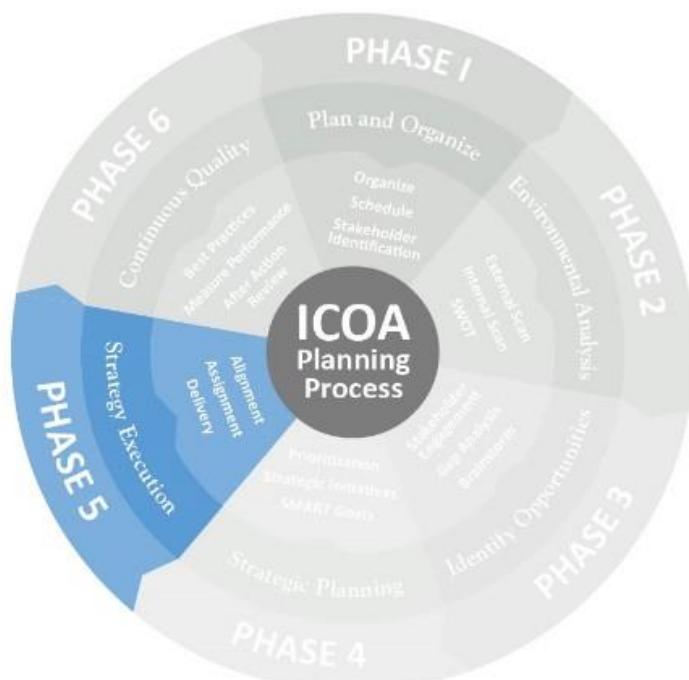


## **Phase Five: Strategy Execution**

Plan your work and work your plan! This is where ICOA shines as an agency. Our plans are promises for the taxpayers of Idaho and the people we serve. Relentless execution is the expectation. Course corrections will be necessary, but continued progress is expected. We never let perfect be the enemy of better.

### Planning Phase Specific Expectations

1. Track, report, and complete assigned objectives in the Idaho State strategic plan, or the Federal State Plan. These will be reported during our May Commissioners' meeting.
2. Complete all goals assigned in the latest Performance Evaluation.
3. Fulfill all duties outlined in the ICOA Operations manual including:
  - o Quarterly website updates/quality assurance
  - o Quarterly education with AAA staff
  - o Quarterly outreach with stakeholders
  - o Quarterly monitoring of financial and unit data
  - o Timely completion of mandated reports
  - o Annual assigned campaigns
  - o Onsite and desk reviews
4. Ongoing communication with your supervisor, using a SBAR format for complex issues.



## Phase Six: Continuous Quality Improvement

ICOA is on the journey to becoming a highly reliable learning organization. This means we must equip ourselves not only for our job today, but in the future.

### Planning Phase Specific Expectations

1. Demonstrate understanding of financial, demographic, and outcome reports related to assigned responsibilities. Identify any anomalies or concerns and discuss with supervisor and Project Manager.
2. Conduct After Action Reviews with internal and external stakeholders and incorporate learnings.
3. Prepare, deliver and evaluate just in time education and training for stakeholders.
4. Develop personal knowledge and skills to position your programs for success in the future.
5. Annually participate in a SFY evaluation of your programs on both the state and individual AAA levels for inclusion in the annual report and update to the Commissioners in the November meeting.

