

**The Heritage Area Agency on Aging
PSA #4**

**Area Plan on Aging
SFY 2016 – 2017
Annual Update**



The Heritage Agency™

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Section 1: 2016-2017 Goals and Strategies

Goal 1: Empower older individuals, their families, and other consumers to make informed decisions about, and to be able to easily access, existing health and long-term care options.

Objective: To increase the number of Iowans obtaining information about home and community-based long-term supports and services.

Focus Area: LifeLong Links

Expansion Activities - 2017 Update

Strategy: Expansion Activities

1. Information, Referral & Assistance/Eligibility, Assistance Navigation

Successes:

- The Heritage Agency worked with IDA, i4a, and other AAAs to create streamlined forms and processes to ensure consistency and quality of services delivered throughout the state. This has resulted in a LifeLong Links Committee Manual that outlines Job Summaries, forms and policies for delivering LifeLong Links services along with Standards Operating Procedures.
- The Heritage Agency hired a Resources and Caregiver Support Specialist on 05/18/2015. This staff member focused on working with our Caregiver Wellness Day Planning Committee to plan for our 2015 Caregiver Wellness Day event. Unfortunately this staff member left The Heritage Agency for another job opportunity on 07/02/2015. Rehiring for this position was put on hold until we received additional information regarding MCO implementation. We have recently hired a Family Caregiver Options Counselor who started on 03/14/16 and will help to expand our outreach and services to Family Caregivers within our seven county service area.
- The Heritage Agency partnered with the East Central Iowa MHDS Region to develop a referral process to ensure that consumers, when referred to LifeLong Links, would get connected with needed services. The process consists of MHDS staff referring consumers to call LifeLong Links and then asking the consumer if that would like to have a LifeLong Links staff follow-up with them to get them connected with services. Once a consumer agrees to a LifeLong Links follow-up call, the MHDS staff then forwards the referral to The Heritage Agency's IR&A Staff for follow-up. The Heritage Staff then follow-up with the client and connects them to needed services.

Challenges:

- IR&A became a registered service. This is a change that occurred after we had submitted our Area Plan and has changed the way in which we track and report on number of consumers served and the number of units of service delivered.
- BIP (Balancing Incentive Program) garnered much confusion with capturing and tracking data within ESP.

- Currently, the information recorded in IAPRS does not accurately reflect the number of persons served or units of service delivered. Since The Heritage Agency subcontracts to deliver a variety of services, a method of tracking consumers served was developed and involves having subcontractors and Heritage staff complete consumer intake forms along with monthly rosters. This is to ensure the units of service can be accurately tracked and recorded within IAPERS and for auditing purposes. It has been our practice to only report units of service for consumers who have completed a consumer intake form. While IAPERS only captures consumers with completed intake forms, the numbers reported on within the Area Plan also capture consumers who are served that may not have completed an intake form due to refusal of sharing demographic information or they did not meet registered service requirements.
- Being able to separate out Family Caregiver Options Counseling from our General Options Counseling services has been a challenge since up until 3/15/16 our agency only had one Options Counselor serving both population groups with General Options Counseling.

Strategies:

- To capture all units of service being capture and reported on properly in ESP and IAPERS, starting in FY2017, The Heritage Agency and our contracted partners will complete intake forms on calls where registered services are delivered, but where not all demographic information is captured. This will ensure more calls are recorded as either an I&A Telephone calls or Family Caregiver calls and then reported on within IAPRS. This change will make our reporting more consistent with how other AAAs are recording and tracking their units of service.
- Our Options Counselor was able to go back and separate out Family Caregivers receiving options counseling vs. consumers receiving General Options Counseling services and we have made changes within our IAPERS reports to reflect these changes. When we hired our Family Caregiver Options Counselor in March we reviewed our internal referral process and now have clearly defined triggers of when Options Counseling referrals are made to our Family Caregiver Options Counselor vs. our General Options Counselor. We are confident that the changes we have made will more accurately track the services that are being delivered with each registered service.
- In June, AAAs will gain access to the new Harmony/Mediware database. The new database will streamline our reporting process and cut down on duplicate data entry and reporting to the State. The layout of the client detail screens will also create efficiencies on how we communicate with consumers resulting in a shorter call time and less documentation after the call has ended.
- Fall 2016, AAAs across the state of Iowa will all be connected through a common phone system. This will be a huge advancement. We are working towards building additional partnerships that will also connect with other partners such as Untied Way 2-1-1, Iowa COMPASS, and Centers for Independent Living. These partnerships will mean better outcomes for consumers since we will be able to directly connect consumers to services.

3. Independent Living / Care Transition Support

Update:

- a. **Community Caregiver Center** - On December 17, 2015, the Family Caregiver Center of Mercy opened its doors to provide needed support to Family Caregivers within our community. The Heritage Area Agency assisted in Mercy’s feasibility study that led to the opening of this new facility and continues to work closely with the new facility’s Director to develop a referral process that directly family caregivers in need to receive Options Counseling services.

Individuals to Be Served – 2017 Update

The table below lists the number of individuals served in SFY2015, SFY2016 to date from all funding sources and estimated number to be served in SFY 2017 (7/1/2016 – 6/30/2017).

Table 1: LifeLong Links Consumers Served

Category	SFY 2015 Actual	SFY 2016 [02/29/16]	Projected SFY 2017
Total Number of LifeLong Links IR&A consumers	6,353	3,225	4,838
IR&A Consumers Served Aged 60+	4,288	2,177	3,266
IR&A Consumers who are Caregivers	1,836	932	1,398
IR&A Consumers Between 18 and 60 with a Disability	438	223	334
Total Number of LifeLong Links Options Counseling Consumers	202	160	240
Options Counseling Consumers Aged 60+	162	128	192
Options Counseling Consumers who are Caregivers	54	43	64
Options Counseling Consumers Between 18 & 60 with a Disability	28	22	33

Source: [IR&A and Options Counseling Consumers were compiled using the ESP database Client Contact Activity Report from 07/01/2016 to 02/29/2016. IR&A consumer contacts include: I&A Telephone Call, I&A Face to Face, and Telephone Calls (Total Heritage IR&A Consumers = 801). Also included within the IR&A consumers, are the number of First Call for Help reported serving from 07/01/2016 to 02/29/2016 (Total First Call for Help Consumers = 2,424). Options Counseling consumer contacts include: Face to Face – Options Counseling and Telephone Call – Options Counseling.]

Innovative Funding & Partnership Activities - 2017 Update

Updates:

1. **Development of a Fee-for Service Model** – While Heritage has developed fee-for-service process and materials; this effort was put on hold until we received additional information regarding MCO implementation. The Heritage Agency has worked with the Iowa Department on Aging, Iowa Area Agency on Aging, and other Area Agency on Aging partners to create Standard Operating Procedures on how to deliver services. This will help strengthen our future efforts as we continue to build a fee-for-service model.
2. **Marketing & Outreach** – Since the development of a fee-for-service model was put on hold, our marketing & outreach efforts have also been delayed.
3. **Community Referrals** – We have continued to hold our quarterly LifeLong Links Advisory Council meetings to strengthen partnerships within our network of providers.

The Heritage Agency has also been in conversation with United Way 2-1-1, Centers for Independent Living, and Iowa COMPASS to build a connected ICN system to provide better outcomes for consumers.

4. **Internal Referrals** – Our IR&A Specialists and Options Counseling staff have all completed the additional AIRS CIRS A/D Certification and Boston University online training. When an internal referral is made to our Options Counseling Services as well as our Elder Abuse Prevention and Awareness Program, a Level 1 Assessment is completed along with a Consumer Intake form by our IR&A Staff.

Expenditures – 2017 Update

The table below lists actual and projected expenditures from all funding sources to support IR&A / Access Assistance and Options Counseling activities.

Table 2: LifeLong Links Funding Sources

Funding Source	FY2015 Actual	FY2016 Projected	FY2017 Projected
Federal	\$45,315	\$74,414	\$74,544
State	\$243,396	\$365,176	\$243,872
Local	\$447,757	\$453,455	\$426,250
In-Kind	0	0	0
Total	\$736,468	\$893,045	\$744,666

Source: [2015: IAFRS Quarter 4; 2016 and 2017 Area Plan Budget]

Goal 2: Enable older individuals to remain in their own homes with high quality of life for as long as possible through the provision of home and community-based services, including supports for family caregivers.

Objective: To increase the number of Iowans accessing home and community-based services they need to remain independent in their home.

Focus Area 1: Transportation & Housing

1. Transportation Update:

Transportation Needs – The Heritage Agency through our LifeLong Links – ADRC Advisory Council identified transportation along with long-term care planning as their top two issues to further investigate within 2015-2016 calendar year. A small workgroup of interested providers met on a quarterly basis and discussed how to address transportation issues. Listed below is a summary of the Transportation Workgroup shared within the July 2015 LifeLong Links Advisory Council meeting.

- Stigma of using public transportation
- Scheduling of Rides
- Service Gaps
- Affordability
- Eligibility Requirements

- Awareness of available resources and/or how to use public transportation

Successes:

- Heritage is holding Transportation Workgroup discussions with a small group of LifeLong Links – ADRC Advisory Council members. The workgroup has helped to further define strategies on how to address transportation issues connected with stigma and lack of awareness. It has also helped strengthen our partnerships with our local mobility manager, the City of Cedar Rapids, and our Centers for Independent Living.
- Heritage staff has also participated in Metro Transit Study stakeholder discussions to advocate on behalf of older adults and persons living with a disability to help improve service gaps with public transportation systems.
- Heritage assisted with the proportion of the Johnson Co. Community forum on transportation. The forums resulted in increased awareness of the issues and of available resources.

Challenge:

- Lack of capacity and funding to address issues.

Strategies:

- We are currently partnering with Access2Independence to offer a Travel Training program in June to our local Human Service Transportation Advisory Group to increase health and human service providers ability connect their consumers to transportation options.
- The Heritage Agency will continue to explore ways to address rural transportation needs within our LifeLong Links Transportation Workgroup.
- The Heritage Agency will continue participating in community/coalition provider discussions to identify needs and explore solutions for transportation.

2. Housing Update:

Successes:

- Heritage helped coordinate regional Dialogue on Aging discussions that elevated home modifications as an issue. These efforts resulted in an Elevate Aging statewide group that was formed and a policy agenda that was created.
- The Tylor Community Action Plan Network group invited The Heritage Agency to participate in a discussion on new housing development in the Taylor Neighborhood area and how it will impact elderly.
- The Heritage Agency participates in the Johnson Co. Livable Community Policy Board and Housing Team to further identify and address needs within Johnson Co.
- Heritage assisted with the proportion of the Johnson Co. Community forum on housing. The forums resulted in increased awareness of the issues and of available resources.

Challenge:

- Lack of capacity and funding to address issues.

- Advocacy efforts to encourage the state, including urban and rural areas, to move in relationship to housing modification, housing availability, universal design and zoning codes.

Strategies:

- The Heritage Agency will continue participating in community/coalition provider discussions to identify needs and explore solutions for housing.
- Advocate via Elevate Aging/White House Conference on Aging on property tax credits and changes zoning codes to encourage universal design, home modifications.
- Provide education to those reaching mid-life about importance of universal design and aging in place.

Individuals to Be Served – 2017 Update

The table below lists the number of individuals served in SFY2015, SFY2016 to date from all funding sources and estimated number to be served in SFY 2017 (7/1/2016 – 6/30/2017).

Table 3: Transportation Consumers

Category	SFY2015 Actual	SFY 2016 As of: [02/29/16]	SFY 2017 Projected
Number of Transportation Units (one-way trips) Provided	7,208	4,656	7,100
Number of Transportation Consumers Served	347	317	350

Source: [IAPRS Actual Assisted Transportation & Transportation units and unduplicated clients as of 2-2-16 and projected out in 2017]

Expenditures – 2017 Update

The table below lists actual and projected expenditures from all funding sources to support this effort.

Table 4: Transportation Funding Sources

Funding Source	FY2015 Actual	FY2016 Projected	FY2017 Projected
Federal	\$45,315	\$74,414	\$74,544
State	\$243,396	\$365,176	\$243,872
Local	\$447,757	\$453,455	\$426,250
In-Kind	0	0	0
Total	\$736,468	\$893,045	\$744,666

Source: [IAFRS 2015: Quarter 4; 2016 and 2017: Area Plan Budget]

Focus Area 2: Caregiver: Family & Grandparent-Older Relative

Caregiver Needs - 2017 Update

Updates:

1. ***Resources and Caregiver Support Specialist Position*** – The Heritage Agency hired a Resources and Caregiver Support Specialist on 05/18/2015. This staff member focused

on working with our Caregiver Wellness Day Planning Committee to plan for our 2015 Caregiver Wellness Day event. Unfortunately this staff member left The Heritage Agency for another job opportunity on 07/02/2015. Rehiring for this position was put on hold until we received additional information regarding MCO implementation. We are happy to report we have recently hired a Family Caregiver Options Counselor who started on 03/14/16 and will help to expand our outreach and service to Family Caregivers within our seven county service area.

2. **Family Caregiver Center of Mercy**– On December 17, 2015, the Family Caregiver Center of Mercy opened its doors to provide needed support to Family Caregivers within our community. The Heritage Area Agency assisted in Mercy’s feasibility study that led to the opening of this new facility and continues to work closely with the new facility’s Director to building partnerships for a strong referral network to local resources and Options Counseling services for Family Caregivers.

Success:

- The Heritage Area Agency on Aging partnered with AARP and 17 local community providers to hold our 2015 Caregiver Wellness Day event. We had 103 family caregivers in attendance; this is 36 more people over last year’s attendance of 64. We also had 24 community vendors contribute \$10,500 to hold this free event; this is double the amount we have raised in past years. Our total cost to hold the event was \$7,715.10. The remaining \$2,784.90 went towards supporting The Heritage Agency’s Family Caregiver Program.

Challenge:

- Delay in hiring for Family Caregiver position due to changes with Managed Care. This delay also contributed to drop in caregiver units.
- Caregiver program is in need of modernization and alternative ways to reach long distance caregivers.
- Being able to separate out Family Caregiver Options Counseling from our General Options Counseling services has been a challenge since up until 3/15/16 our agency only had one Options Counselor serving both population groups with General Options Counseling.

Strategies:

- Build partnerships that increase referrals and community outreach to family caregivers.
- Hired a Family Caregiver Options Counselor
- i4a is convening a group of AAA staff to look at ways to modernize, professionalize, and look to common core programs that stretch across all AAAs.
- Our Options Counselor was able to go back and separate out Family Caregivers receiving options counseling vs. consumers receiving General Options Counseling services and we have made changes within our IAPERS reports to reflect these changes. When we hired our Family Caregiver Options Counselor in March we reviewed our internal referral process and now have clearly defined triggers of when Options Counseling referrals are

made to our Family Caregiver Options Counselor vs. our General Options Counselor. We are confident that the changes we have made will more accurately track the services that are being delivered with each registered service.

Individuals to be Served – 2017 Update

The table below lists the number of individuals served in SFY2015, SFY2016 to date and estimated number to be served in SFY 2017 (7/1/2016 – 6/30/2017).

Table 5: Caregiver Consumers

Category	SFY 2015 Actual	SFY 2016 As of: [02/29/16]	SFY2017 Projected
Total Number of Caregiver Consumers Served	481	448	618

Source: [Caregiver Consumers compiled using the ESP database Client Contact Activity Report from 07/01/2016 to 02/29/2016. Caregiver consumer contacts include: Access Assistance – Caregiver, Counseling – Caregiver, Telephone Call – Caregiver, Face to Face – Caregiver (Total ESP Caregiver Consumers = 345). Heritage also includes family caregivers who attended the November 2015 Caregiver Wellness Day (Total CWD Family Caregivers = 103).]

Additional Services – 2017 Update

The table below indicates the percentage of caregiver consumers who received more than one registered service.

Table 6: Percentage of caregivers receiving more than one AAA service

Category	SFY 2015 Actual	SFY 2016 As of: [02/29/16]	SFY2017 Projected
Percent of caregivers served receiving more than one AAA service	0%	3%	3%

Source: [2015 and 2016: IAPRS Client Listing]

Expenditures – 2017 Update

The table below lists actual and projected expenditures from all funding sources to support this effort.

Table 7: Caregiver Funding Sources

Funding Source	SFY 2015 Actual	SFY 2016 Projected	SFY 2017 Projected
Federal	\$197,339	\$206,228	\$175,795
State	\$11,807	\$47,706	\$65,963
Local	\$198,725	\$229,721	\$231,192
In-Kind	0	0	0
Total	\$407,871	\$483,655	\$472,950

Source: [2015: IAFRS Quarter 4; 2016 and 21017: Area Plan Budget]

Goal 3: Empower older individuals to stay active and healthy through Older Americans Act services

Objective: To increase the number of Iowans accessing nutrition programs so that they may remain active and healthy as possible.

(Heritage and volunteer leadership note that the word “increase” in the objective statement is unreachable with the stagnation of funding for nutrition on a federal level, declining participation and contributions, and difficulty modernizing the program to serve dual populations. The word “maintain” is more attainable and realistic with the next Fiscal Year.)

Focus Area: Food Security Project

Strategies – 2017 Update

The Heritage Agency has had success in several of its strategies in the current two-year plan, even though those strategies required adjustment as FY 2015 ended and FY 2016 began and continues. The Food Insecurity Grant Program (F.I.G.) collaboration with a local HY-VEE Food Store ended on June 30, 2016. While the program was very successful and popular, voluntary contributions towards the program were only a fraction of what was anticipated and no other funding streams materialized to maintain the proper function of the program. In addition, there were some logistical, billing, and customer services issues that needed to be addressed before the project could continue. The decision was made to end the program in the best interest of providing a premier product and experience. Interest still remains with HY-VEE and Heritage to reinstate the program at a later date. If the F.I.G. Program is offered in the future, the program has the potential to expand into several other locations throughout the Heritage region.

An additional barrier to the stated strategies was the inability to secure a location to reopen a dining site in Northwest Cedar Rapids. Funding through the Fill the Plate effort was available to fund the meals in FY 2015, but logistical roadblocks with securing a location and also at the provider level, did not allow for this strategy to develop. Heritage is hopeful that additional nutrition services will be made available to older adults in that particular area of Cedar Rapids beyond FY '17. Transportation to and from local dining sites continues to be a major factor in drawing older adults to participate in the congregate program.

One strategy that developed unexpectedly to assist in reducing food insecurity was the development of the “Senior Tote” program. This pilot project is a collaboration of the Heritage Agency and the HACAP Food Reservoir, which provides supplemental food and nutrition education to current participants that either receive OAA-funded home, delivered meals, or Waiver meals provided by the subcontractor, that do not receive meals on the weekends. This service is currently being offered at three senior dining sites in the counties of Cedar, and Iowa, and operates very similar to the Weekend Backpack Program currently offered in many school systems. Contributions are accepted towards this program, but to date, no contributions have been received. The Senior Tote Program is funded in-part, but a Subaru Share the Love Grant and also through the HACAP Food Reservoir. The program is reviewed every quarter and after a year of operation, expansion into other counties will be considered, maintaining an emphasis on

rural areas and food deserts in the Heritage Region. No federal or state funds are used to provide this service, and are a true example of a local partnership addressing an ever growing issue.

The services that have been provided to date have provided a gateway for older adults to access additional services. In both FY' 15 and FY'16, Nutrition Education, Non-waiver Case Management, and Adult Day Services were the services that were accessed by nutrition participants. Nutrition education was also offered and accessed by several participants; however, many participants chose not to participate in this service. Currently, there are increased efforts to modernize and redevelop the process that nutrition providers use to inform nutrition participants of additional services that could address some of the ADLS and IADLS that are identified on the completed Consumer Intake Forms.

Due to declining contribution from participants and declining participation into the program creating an unstable budget coupled with uncertainties of the reality with MCO in meal program, and lack of program modernization; Heritage staff requested and the Advisory Council grant the formation of a Nutrition Ad-Hoc Subcommittee to look at 1. Program efficiencies, 2. Program effectiveness and 3. Advocacy. Several goals have been established by this group. 1. Look at how partners can maintain their own contributions with Heritage funding allocated differently. 2. Review current contribution rates and model. 3. Establish marketing plan for regional program while erasing the stigma of it being a “free meal”/Establishing Advocacy plan. 4. Look at modernizing the program through menu options and meal choices. This Sub-Committee is to bring forth possible solutions to modernizing the nutrition program and ways to help minimize continued fiscal challenges.

Successes:

- The Food Insecurity Grant Program (F.I.G.) collaboration with a local HY-VEE Food Store will end on June 30, 2016.
- While the program was very successful and popular, voluntary contributions towards the program were only a fraction of what was anticipated and no other funding streams materialized to maintain the proper function of the program.
- The decision was made to end the program in the best interest of providing a premier product and experience.
- Interest still remains with HY-VEE and Heritage to reinstate the program at a later date.
- If the F.I.G. Program is offered in the future, the program has to potential to expand into several other locations throughout the Heritage region.

Challenges:

- A challenge was the inability to secure a location to reopen a dining site in Northwest Cedar Rapids. Funding through the Fill the Plate effort was available to fund the meals in FY 2015, but logistical roadblocks with securing a location and also at the provider level, did not allow for this strategy to develop. Heritage is hopeful that additional nutrition services will be made available to older adults in that particular area of Cedar Rapids beyond FY '17.
- Transportation to and from local dining sites continues to be a major factor in drawing older adults to participate in the congregate program.

- Participant contributions into the nutrition programs continue to decline at a pace that is not keeping pace with the budgeted amount.

Strategies:

- One strategy that developed unexpectedly to assist in reducing food insecurity was the development of the “Senior Tote” program. This pilot project is a collaboration of the Heritage Agency and the HACAP Food Reservoir, which provides supplemental food and nutrition education to current participants that either receive OAA-funded home delivered meals, or Waiver meals provided by the subcontractor, that do not receive meals on the weekends.
- This service is currently being offered at three senior dining sites in the counties of Cedar, and Iowa, and operates very similar to the Weekend Backpack Program currently offered in many school systems.
- Contributions are accepted towards this program, but to date, no contributions have been received.
- The Senior Tote Program is funded in-part, but a Subaru Share the Love Grant and also through the HACAP Food Reservoir. The program is reviewed every quarter and after a year of operation, expansion into other counties will be considered, maintaining an emphasis on rural areas and food deserts in the Heritage Region.
- No federal or state funds are used to provide this service, and are a true example of a local partnership addressing an ever growing issue.
- Heritage staff requested and the Advisory Council granted the formation of a Nutrition Ad-Hoc Subcommittee to look at program efficiencies, program effectiveness and advocacy and to bring forth possible solutions to modernizing the nutrition program and ways to help minimize continued fiscal challenges.

Individuals to be Served – 2017 Update

The table below lists the number of individuals served in SFY2015, SFY2016 to date and estimated number to be served in SFY 2017 (7/1/2016 – 6/30/2017).

Table 8: Meal Program Consumers

Category	SFY 2015 Actual	SFY 2016 As of: [02/29/16]	SFY 2017 Projected
Total Number of Meal Program Consumers Served	3,385	2,617	2,950

Source: IPERS reports [Client Service Units Reports and Client listing Reports for date ranges of 7/1/14-6/30/15 and 7/1/15-12/31/15, covering nutrition and all services offered by HAAA accessed on 2/19/16. Food Insecurity Grant final report completed 6/30/15, Senior Tote Usage data obtained by pilot sites as of January 3, 2016.]

Additional Services – 2017 Update

The table below details the percentage of meal program consumers receiving an additional registered service.

Table 9: Percentage of meal program consumers receiving additional AAA services

Category	SFY 2015 Actual	SFY 2016 As of: [02/29/16]	SFY 2017 Projected
Percent of meal program consumers served receiving additional AAA services	77%	76%	76%

IPERS reports [Client Service Units Reports and Client listing Reports for date ranges of 7/1/14-6/30/15 and 7/1/15-12/31/15, covering nutrition and all services offered by HAAA accessed on 2/19/16. Food Insecurity Grant final report completed 6/30/15, Senior Tote Usage data obtained by pilot sites as of January 3, 2016.]

Expenditures – 2017 Update

The table below lists actual and projected expenditures from all funding sources to support this effort.

Table 10: Meal Programs Funding Sources

Funding Source	SFY 2015 Actual	SFY 2016 Projected	SFY 2017 Projected
Federal	\$1,102,080	\$1,013,577	\$1,079,191
State	\$17,909	\$39,426(ESG)	\$0
Local	\$586,931	\$522,829	\$409,362
In-Kind	\$50,000	\$45,000	\$30,000
Total	\$1,756,920	\$1,620,832	\$1,518,553

Source: [Kirkwood Community College Foundation Account Report generated on 1/5/16 and most recently reviewed on 3/3/16. FY’ 15 Fill the Plate Income Breakdown report finalized on 7/9/15, FY ’16 Fill the Plate Income Breakdown report created on 11/2/15 and last updated on 1/5/16. FY ’15 and FY’16 Heritage Budgets reviewed on 3/3/16, Food Insecurity Grant Contract review on 3/3/16. Local funds include voluntary contributions and also proceeds generated through the Fill the Plate effort.]

Goal 4: Ensure the rights of older Iowans and prevent their abuse, neglect and exploitation

Objective: To decrease abuse, neglect, and exploitation of older Iowans.

Focus Area: Elder Abuse Prevention and Awareness

Strategies – 2017 Update

Successes:

- During the first half of FY16, 187 community members attended elder abuse presentations to increase awareness and resources available.
- On Jan. 26, 2016, Heritage’s Regional Protective Services Coordinator was interviewed by TV station KCRG on the topic of why seniors are preyed upon by scam artists, what scams they fall victim to, how to prevent, and resources available.
- On May 6, 2016, Heritage’s Regional Protective Services Coordinator will present a break-out session on elder abuse at the National Association of Insurance and Financial Advisors Conference in Cedar Rapids.
- The Heritage Agency has applied for the federal VOCA grant to access Victims of Crime Act funding to support our Elder Abuse Prevention and Awareness Program (EAPAP).

Challenges:

- A high turn-over with Elder Rights Specialists at our two sub-contracted agencies, which has required additional training on EAPAP processes and procedures.
- A decrease in referrals in Johnson County so far this fiscal year, which is possibly due to a high turn-over in Elder Rights Specialist staff.
- Coordination of referrals between DHS to Heritage for AAA follow-up. (i.e. when an Elder Abuse case is “unfounded” AAA can offer support through the EAPAP.)

Strategies:

- Continue with Elder Abuse Prevention and Awareness program education, outreach, and advocacy efforts.
- Compile data from EAPA consumer forms to capture the nature of the abuse and what type of services an individual is receiving related to Elder Abuse Prevention and Awareness Program.
- DHS to begin referring “unfounded cases” through the LLL call center for distribution to the appropriate AAA for follow-up. Heritage will monitor for referrals and data gathering.

Individuals to be Served – 2017 Update

The table below lists the number of individuals served in SFY2015, SFY2016 to date and estimated number to be served in SFY 2017 (7/1/2016 – 6/30/2017).

Table 11: Elder Abuse Prevention and Awareness Consumers

Category	SFY 2015 Actual	SFY 2016 As of: [02/29/16]	SFY 2017 Projected
Total Number of EAPA Active Consumers Served	68	70	80

Source: [EAPA Consumers served is compiled using client rosters and Heritage unit reports and includes persons receiving Assessment & Intervention and/or Consultation Services between 07/01/2015 to 02/29/2016.]

Additional Services – 2017 Update

The table below details the percentage of EAPA consumers receiving more than one registered service.

Table 12: Percentage of EAPA consumers receiving additional AAA services

Category	SFY 2015 Actual	SFY 2016 As of: [02/29/16]	SFY2017 Projected
Percent of EAPA consumers receiving additional AAA services	18%	20%	20%

Source: [Client records.]

Expenditures – 2017 Update

The following table lists actual and projected expenditures from all funding sources to support this effort.

Table 13: EAPA Funding Sources

Funding Source	FY2016 Projected	2017 Projected
Federal	0	0
State	\$108,569	\$87,500
Local	\$10,172	\$8,113
In-Kind	0	0
Total	\$118,741	\$95,613

Source: [2016: Area Plan Budget supporting documentation and Provider RFP applications.]

Section 2: Service Planning and Evaluation

FY 2016 Projected Older Americans Act Consumers and Service Units

SERVICE		Service Units Provided	Consumers Served	60+ Rural	60+ Minority	60+ Minority Below Poverty	60+ Below Poverty	SLP Low Income	SLP Moderate Income
01A: Administration	General Aging								
	Caregiver								
1: Personal Care	General Aging								
2: Homemaker	General Aging	176	6	1	1	1	4		
3: Chore	General Aging	695	92	31	1	1	61		
4: Home Delivered Meals	General Aging	267,514	1,573	346	33	18	867		
5: Adult Daycare	General Aging	11,906	703	8	7	4	37		
6: Case Management	General Aging	7,281	892	107	59	36	546		
7: Congregate Meals	General Aging	79,907	1,376	522	21	8	516		
8: Nutrition Counseling	General Aging	30	30	6	6	1	6		
9: Assisted Transportation	General Aging	1,230	175	63			80		
10: Transportation	General Aging	6,114	279	100			128		
11: Legal Assistance	General Aging	825	461	240	15	2	165		
12: Nutrition Education	General Aging	12,555	2,025	506	39	21	1,065		
13: Information & Assistance	General Aging	1,220	952	465	27	3	313		
14: Outreach	General Aging	3,582	1,012	494	32	2	243		
B02: Health Promotion & Disease Prevention	General Aging	40	40	18	1		10		
B07: Evidence Based Health Activities	General Aging	40	40	18	1		10		
C07: EAPA Consultation	General Aging	52	13	7			5		
C08: EAPA Assessment & Intervention	General Aging	409	52	26	1		15		
C09: EAPA Training & Education	General Aging	455	455	222	2		150		
C10: Self-Directed Care	General Aging								
D01: Training & Education	General Aging	1,101	1,101	519	30		330		
E05: Options Counseling	General Aging	1,145	229	44	18	9	120		
F02: Material Aide	General Aging	24	12	6			6		
F05: Volunteer Support	General Aging								
CG1: CG Access Assistance	Caregiver	693	521	250	16	1	172		
CG2: CG Self-Directed Care	Caregiver	3	3	1			1		
CG3: CG Counseling	Caregiver	50	50	25	1		17		
CG4: CG Information Services	Caregiver	48	6,935	334	200	20	2,288		
CG5: CG Respite	Caregiver	14,669	117	51	2		32		
CG6: CG Supplemental Services	Caregiver	3	3	1			1		
CG7: CG Home Delivered Meals	Caregiver								
CG8: CG Options Counseling	Caregiver	325	65	12	5	3	34		
GO1: GO Access Assistance	Caregiver								
GO2: GO Self-Directed Care	Caregiver								
GO3: GO Counseling	Caregiver								
GO4: GO Information Services	Caregiver								
GO5: GO Respite	Caregiver								
GO6: GO Supplemental Services	Caregiver								
GO7: GO Home Delivered Meals	Caregiver								
GO8: GO Options Counseling	Caregiver								

FY 2017 Projected Older Americans Act Consumers and Service Units

SERVICE		Service Units Provided	Consumers Served	60+ Rural	60+ Minority	60+ Minority Below Poverty	60+ Below Poverty	SLP Low Income	SLP Moderate Income
01A: Administration	General Aging								
	Caregiver								
1: Personal Care	General Aging								
2: Homemaker	General Aging	500	11	1	1	1	8		
3: Chore	General Aging	695	92	30	1	1	60		
4: Home Delivered Meals	General Aging	260,706	1,837	401	24	20	1,249		
5: Adult Daycare	General Aging	13,828	77	8	5	4	60		
6: Case Management	General Aging	4,241	600	145	7	5	443		
7: Congregate Meals	General Aging	67,737	1,472	583	17	7	724		
8: Nutrition Counseling	General Aging	19	19	3	5	4	7		
9: Assisted Transportation	General Aging	1,347	132	72	1	1	49		
10: Transportation	General Aging	4,606	305	44	4	1	216		
11: Legal Assistance	General Aging	828	403	250	7	6	140		
12: Nutrition Education	General Aging	10,529	2,305	609	25	19	1,469		
13: Information & Assistance	General Aging	2,156	1,273	135	23	1	688		
14: Outreach	General Aging	3,581	387	200	50	5	200		
B02: Health Promotion & Disease Prevention	General Aging	9	8	1	1	1	4		
B07: Evidence Based Health Activities	General Aging	40	40	1	1	1	4		
C07: EAPA Consultation	General Aging	12	11	1	1	1	7		
C08: EAPA Assessment & Intervention	General Aging	276	65	7	3	3	47		
C09: EAPA Training & Education	General Aging	512	243	243	1	1	100		
C10: Self-Directed Care	General Aging								
D01: Training & Education	General Aging	709	709	500	5	4	200		
E05: Options Counseling	General Aging	851	220	32	2	1	96		
F02: Material Aide	General Aging	139	21	5	1	1	15		
CG1: CG Access Assistance	Caregiver	536	304	25	1	1	7		
CG2: CG Self-Directed Care	Caregiver	3	3						
CG3: CG Counseling	Caregiver	23	21	4	1	1	1		
CG4: CG Information Services	Caregiver	155	155	48	1	1	1		
CG5: CG Respite	Caregiver	15,608	137	8	1	1	12		
CG6: CG Supplemental Services	Caregiver	3	3	1	1	1	1		
CG7: CG Home Delivered Meals	Caregiver								
CG8: CG Options Counseling	Caregiver	91	32	10	3	1	3		
GO1: GO Access Assistance	Caregiver								
GO2: GO Self-Directed Care	Caregiver								
GO3: GO Counseling	Caregiver								
GO4: GO Information Services	Caregiver								
GO5: GO Respite	Caregiver								
GO6: GO Supplemental Services	Caregiver								
GO7: GO Home Delivered Meals	Caregiver								
GO8: GO Options Counseling	Caregiver								

Service Activity and Data Collection Performance

IDA reviews Consumers Served and Units Provided data to evaluate service reach (people served) and activity (most frequently used services, increase/decrease demand or cost, and/or priorities) for mandatory services. IDA also reviews the percentage of consumers who complete an Aging & Disability Network Consumer Intake Form once during the state fiscal year in which they receive a congregate meal and/or another registered service. IDA evaluates this information because it ensures that IDA and agencies have accurate information about the individuals they serve for planning, program evaluation, and required reporting purposes.

Results: Service Data for SFY2014, SFY2015, and SFY2016

The table below contains the agency's consumer served and units provided for mandatory services in SFY2014 and SFY 2015 and projected for SFY2016.

Mandatory Service	data category	SFY 2014 Actual	SFY 2015 Projected	SFY 2015 Actual	2015 % Achieved	SFY 2016 Projected	2016 % Achieved As of [2/29/16]
Case Management	Consumers	1,026	914	943	103%	892	91%
	Units	7,449	7,542	7,135	95%	7,281	44%
Congregate Meals	Consumers	2,447	1,996	1,394	70%	1,376	78%
	Units	97,589	90,287	77,588	86%	79,907	55%
Health Promotion/ Disease Prevention	Consumers	48	40	29	73%	40	15%
	Units	48	40	29	73%	40	18%
Home Delivered Meals	Consumers	1,867	1,765	1,594	90%	1,573	84%
	Units	286,156	256,971	257,660	100%	267,514	63%
Information & Assistance	Consumers	8,660	7,324	7,790	106%	952	90%
	Units	9,518	7,900	9,504	120%	1,220	121%
Legal Assistance	Consumers	422	499	381	76%	461	58%
	Units	660	660	721	109%	825	67%
Nutrition Counseling	Consumers	48	34	40	118%	30	27%
	Units	48	34	40	118%	30	27%
Nutrition Education	Consumers	2,807	2,700	2,149	80%	2,025	82%
	Units	14,295	14,000	12,525	89%	12,555	56%
Options Counseling	Consumers	250	640	214	33%	229	64%
	Units	739	1,920	872	45%	1,145	45%

Notes: Consumer counts for Information and Assistance for FY14 and 15 are not an unduplicated consumer count. The projected for FY16 is for an unduplicated consumer count.
 Consumer counts for Legal Assistance are not an unduplicated consumer count.
 Options Counseling was not a mandatory service until January 2014.

Results: Consumer Data Collection

IDA expects that at least 90% of consumers who receive a congregate meal and/or another registered service will complete an Aging & Disability Network Consumer Intake Form once during the state fiscal year.

The table below contains the agency's intake form completion rate for SFY2014 and SFY2016 for the first quarter of SFY 2016.

Congregate Meal Consumers	SFY2014 Actual	SFY2015 Actual	SFY 2016 As of: [02-29-16]
# Consumers	2,449	1,394	1,079
# Forms Completed	2,008	1,394	1,079
% of Consumers Registered	82%	100%	100%

Discussion: Service Projections and Data Collection

Service Projections and Data Collection – SFY 2017 Update

The primary issues Heritage encounters in forecasting service projections and in collecting data includes the following: having limited trend data inclusive of target population needs and/or potential population for various services; fluctuations in funds to provide services; limited service providers in rural areas to deliver the service; implementing our formalized Quality Assurance Plan; having tools in place to collect solid unduplicated client data, and dedicating staff capacity to analyze meaningful trend data and applying the results of the data to strategic outcome measures.

The Heritage Agency has an established process to evaluate data for planning and program evaluation, an agency wide Quality Assurance and Improvement Program in addition to consumer satisfaction surveys, contract monitoring, site visits, task force feedback and community forums and more.

One area that Heritage struggles to identify is unmet needs. We would like to work over the next year to try to find a way to gather such data to use in future planning.

Heritage is also an active member of the Area Plan Pre-Planning Committee established by the Iowa Department on Aging.

Section 3: Intent / Assurances

Verification of Intent

Authorized Signatures

Compliance with Assurances and General Provisions

Verification of Intent

The Heritage Area Agency on Aging (AAA) accepts full authority and responsibility to develop and administer the FY2016-SFY 2017 Area Plan on Aging in accordance with all requirements of the Older Americans Act as amended 2006, state laws, rules, and procedures. By accepting this authority and responsibility, the area agency agrees to develop and administer the Area Plan for a comprehensive and coordinated system of service and to serve as the advocate and focal point for all Iowans 60+ years of age in the area agency’s planning and service area.

The Area Plan on Aging reflects input from a cross section of service providers, consumers, and caregivers that are representative of all areas and culturally diverse populations in the planning and service area; its contents are true, accurate, and incorporate the comments and recommendations of the Area Agency’s Advisory Council and has been reviewed and approved by the Area Agency’s Governing Body. It is acknowledged that intentional misrepresentation or falsification may result in the termination of financial assistance.

The Governing Body has reviewed and approved the FY2016-SFY 2017 Area Plan on Aging and FY2017 Update, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Print Name: Lois Bartelme



Signature, Board of Trustees Chair - Kirkwood Community College 4-28-16
Date Signed

The Advisory Council has reviewed and approved the FY2016-SFY 2017 Area Plan on Aging and FY2017 Update, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Print Name: Nancylee Siebenmann



Signature, Chair – Advisory Council 4/28/16
Date Signed

The Executive Director has reviewed and approved the FY2016-SFY 2017 Area Plan on Aging and FY2017 Update, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Print Name: G. Joseph Sample



Signature, Executive Director 4/28/16
Date Signed

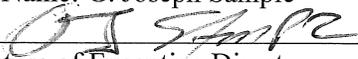
Authorized Signatures

Name of Area Agency on Aging: The Heritage Area Agency on Aging
Street Address: 6301 Kirkwood Blvd. SW
City, State, Zip Code: Cedar Rapids, Iowa 52404

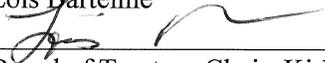
Type of Agency: Separate organizational unit within a multi-purpose agency - Kirkwood Community College
Date of Area Agency on Aging Designation: 1971

Authorized Signatures for Funding Applications and Contracts

Print Name: G. Joseph Sample

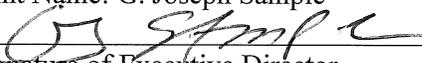

Signature of Executive Director 4/28/16
Date Signed

Print Name: Lois Bartelme

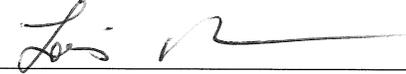

Signature of Board of Trustees Chair, Kirkwood Community College 4-28-16
Date Signed

Authorized Signatures for Fiscal Reports

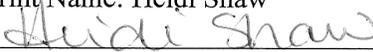
Print Name: G. Joseph Sample


Signature of Executive Director 4/28/16
Date Signed

Print Name: Lois Bartelme

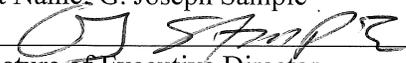

Signature of Board of Trustees Chair, Kirkwood Community College 4-28-16
Date Signed

Print Name: Heidi Shaw

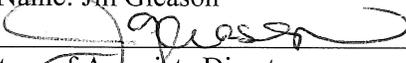

Signature of Fiscal Director 4-28-16
Date Signed

Authorized Signatures for Program Reports

Print Name: G. Joseph Sample


Signature of Executive Director 4/28/16
Date Signed

Print Name: Jill Gleason


Signature of Associate Director 4-28-16
Date Signed

Compliance with Assurances and General Provisions

The Area Agency on Aging hereby assures compliance, on behalf of the area agency, service providers, and/or subcontractors, with any and all applicable federal and state laws, rules, and procedures. Applicable federal and state laws, regulations, rules and procedures include, but are not limited to, the following:

- Older Americans Act, as Amended, 2006
- Code of Federal Regulations
- Assurance of Compliance with the Federal Funding Accountability and Transparency Act (FFATA), which requires grantees and their sub-recipients to have a Dun and Bradstreet Numbering System (DUNS) number (www.dnb.com) and to maintain active and current profiles in the Central Contractor Registration (CCR) (www.ccr.gov).
- Iowa Code Chapter 231, Department on Aging – Older Iowans
- Iowa Administrative Code 17, Department on Aging
- Code of Iowa, Chapter 8F, Government Accountability-Service Contracts, Contractor
- Certification and Reporting

Additionally, the Area Agency on Aging will cooperate fully with the Iowa Department on Aging to assure compliance with provisions required by legislative action taken by the Congress of the United States, and the Iowa General Assembly, and with Iowa Aging Program Instructions during fiscal years 2016-2017 of the Area Plan on Aging.

Further Assurance is given that:

1. The Area Agency on Aging will provide access to and the right to examine all record books, papers or documents related to the Area Plan on Aging.

By signing below, the Chair of the Governing Body, and the Executive Director confirm that he or she read, reviewed, and fully understands the federal and state statutes, regulations, rules and procedures identified within the Compliance with Assurances and General Provisions and agrees to fully comply with all terms thereof.

The Compliance with Assurances and General Provisions is hereby submitted for the FY2016-2017 Area Plan on Aging and the FY2017 Update to the Iowa Department on Aging for approval.

Print Name: Lois Bartelme



Signature of Board of Trustees Chair, Kirkwood Community College

4-28-16
Date Signed

Print Name: G. Joseph Sample



Signature of Executive Director

4/28/16

Date Signed

38 Sec. 306 OLDER AMERICANS ACT OF 1965 (As Amended 2006)
Sec. 306, AREA PLANS

- 306(a) Each area agency on aging designated under section 305(a)(2)(A) shall, in order to be approved by the State agency, prepare and develop an area plan for a planning and service area for a two-, three-, or four-year period determined by the State agency, with such annual adjustments as may be necessary. Each such plan shall be based upon a uniform format for area plans within the State prepared in accordance with section 307(a)(1).
- 306(a)(2) Each area agency on aging shall provide assurances that an adequate proportion, as required under section 307(a)(2), of the amount allotted for part B to the planning and service area will be expended for the delivery of each of the following categories of services-
- 306(a)(2)(A) services associated with access to services (transportation, health services (including mental health services), outreach, information and assistance (which may include information and assistance to consumers on availability of services under part B and how to receive benefits under and participate in publicly supported programs for which the consumer may be eligible), and case management services);
- 306(a)(2)(B) in-home services, including supportive services for families of older individuals who are victims of Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and
- 306(a)(2)(C) legal assistance; and assurances that the area agency on aging will report annually to the State agency in detail the amount of funds expended for each such category during the fiscal year most recently concluded.
- 306(a)(4)(A)(i) (I) provide assurances that the area agency on aging will—
 (aa) set specific objectives, consistent with State policy, for providing services to older individuals with greatest economic need, older individuals with greatest social need, and older individuals at risk for institutional placement; (bb) include specific objectives for providing services to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas; and
 (II) include proposed methods to achieve the objectives described in items (aa) and (bb) of subclause (I);
- 306(a)(4)(A) (ii) provide assurances that the area agency on aging will include in each agreement made with a provider of any service under this title, a requirement that such provider will—(I) specify how the provider intends to satisfy the service needs of low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in the area served by the provider;(II) to the maximum extent feasible, provide services to low-income-minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; and (III) meet specific objectives established by the area agency on

aging, for providing services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area; and

- 306(a)(4)(A)(iii) With respect to the fiscal year preceding the fiscal year for which such plan is prepared, each area agency on aging shall--(I) identify the number of low-income minority older individuals and older individuals residing in rural areas in the planning and service area; (II) describe the methods used to satisfy the service needs of such minority older individuals; and (III) provide information on the extent to which the area agency on aging met the objectives described in clause (a)(4)(A)(i).
- 306(a)(4)(B)(i) Each area agency on aging shall provide assurances that the area agency on aging will use outreach efforts that will identify individuals eligible for assistance under this Act, with special emphasis on-- (I) older individuals residing in rural areas; (II) older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);(III) older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas); (IV) older individuals with severe disabilities;(V) older individuals with limited English proficiency; (VI) older individuals with Alzheimer’s disease and related disorders with neurological and A-3 organic brain dysfunction (and the caretakers of such individuals); and (VII) older individuals at risk for institutional placement; and
- 306(a)(4)(C) Each area agency on agency shall provide assurance that the area agency on aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas.
- 306(a)(5) Each area agency on aging shall provide assurances that the area agency on aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement, with agencies that develop or provide services for individuals with disabilities.
- 306(a)(6)(F) Each area agency will: in coordination with the State agency and with the State agency responsible for mental health services, increase public awareness of mental health disorders, remove barriers to diagnosis and treatment, and coordinate mental health services (including mental health screenings) provided with funds expended by the area agency on aging with mental health services provided by community health centers and by other public agencies and nonprofit private organizations;
- 306(a)(9) Each area agency on aging shall provide assurances that the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 307(a)(9), will expend not less than the total amount of funds

appropriated under this Act and expended by the agency in fiscal year 2000 in carrying out such a program under this title.

- 306(a)(11) Each area agency on aging shall provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as "older Native Americans"), including-
 - 306(a)(11)(A) information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, an assurance that the area agency on aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under this title;
 - 306(a)(11)(B) an assurance that the area agency on aging will, to the maximum extent practicable, coordinate the services the agency provides under this title with services provided under title VI; and
 - 306(a)(11)(C) an assurance that the area agency on aging will make services under the area plan available, to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans.
- 306(a)(13)(A) Each area agency on aging shall provide assurances that the area agency on aging will maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships.
- 306(a)(13)(B) Each area agency on aging shall provide assurances that the area agency on aging will disclose to the Assistant Secretary and the State agency—
 - 306(a)(13)(B)(i) the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals; and
 - 306(a)(13)(B)(ii) the nature of such contract or such relationship.
- 306(a)(13)(C) Each area agency on aging shall provide assurances that the area agency will demonstrate that a loss or diminution in the quantity or quality of the services provided, or to be provided, under this title by such agency has not resulted and will not result from such non-governmental contracts or such commercial relationships.
- 306(a)(13)(D) Each area agency on aging shall provide assurances that the area agency will demonstrate that the quantity or quality of the services to be provided under this title by such agency will be enhanced as a result of such non-governmental contracts or commercial relationships.
- 306(a)(13)(E) Each area agency on aging shall provide assurances that the area agency will, on the request of the Assistant Secretary or the State, for the purpose of monitoring compliance with this Act (including conducting an audit), disclose all sources and expenditures of funds such agency receives or expends to provide services to older individuals.

- 306(a)(14) Each area agency on aging shall provide assurances that funds received under this title will not be used to pay any part of a cost (including an administrative cost) incurred by the area agency on aging to carry out a contract or commercial relationship that is not carried out to implement this title.
- 306(a)(15) provide assurances that funds received under this title will be used-
- 306(a)(15)(A) to provide benefits and services to older individuals, giving priority to older individuals identified in paragraph (4)(A)(i); and
- 306(a)(15)(B) in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;

Section 4: Stakeholder / Public Input

Governing Body

Advisory Council

LLL Advisory Council

Public Hearing Documentation

Governing Body

Governing Body for The Heritage Area Agency on Aging.

Updated On: 4/26/2016

Chair

Name: Lois Bartelme
 Address: 946 23rd Avenue Place #2
 City & Zip Code: Coralville, IA 52241
 County: District III-Johnson & Linn
 Phone: 319-254-2398
 E-mail: loisbart@aol.com
 Term Expires: 2017

Vice-Chair

Name: James Mollenhauer
 Address: PO Box 156
 City & Zip Code: Marion, IA 52302
 County: District VII-Linn & Johnson
 Phone: 319-431-4374
 E-mail: jamollenhauer@gmail.com
 Term Expires: 2017

Secretary/Secretary Treasurer

Name: Carrie Anderson (appointed by KCC)
 Address: 6301 Kirkwood Blvd SW
 City & Zip Code: Cedar Rapids, IA 52404
 County: n/a
 Phone: 319-39-5500
 E-mail: canders@kirkwood.edu
 Term Expires: n/a

Treasurer (if separate officer)

Name: Jim Choate (appointed by KCC)
 Address: 6301 Kirkwood Blvd SW
 City & Zip Code: Cedar Rapids, IA 52404
 County: n/a
 Phone: 319-398-7612
 E-mail: jim.choate@kirkwood.edu
 Term Expires: n/a

Other Members

Name: Keith Stamp
 Address: 17787 222nd Street
 City & Zip Code: Monticello, IA 52310
 County: District I-Jones
 Phone: 319-465-5543
 E-mail: kstamp@gwaea.org
 Term Expires: 2017

Name: Tracy Pearson
 Address: 572 150th Street
 City & Zip Code: Mechanicsville, IA 52306
 County: District II-Cedar & Linn
 Phone: 319-895-6224
 E-mail: tpearson@pearsoncpas.com
 Term Expires: 2019

Name: Lorraine Williams
 Address: 125 Green Meadows Drive
 City & Zip Code: Washington, IA 52353
 County: District IV- Washington
 Phone: 319-461-6301
 E-mail: Lorraine@cafedodici.com
 Term Expires: 2019

Name: Alan Jensen
 Address: 705 West Broad Street
 City & Zip Code: North English, IA 52316
 County: District V-Iowa & Johnson
 Phone: 319-664-3179
 E-mail: alanjensen4@gmail.com
 Term Expires: 2019

Name: Joel Thys
 Address: 2015 78th Street
 City & Zip Code: Blairstown, IA 52209
 County: District VI-Benton & Linn
 Phone: 319-454-6926
 E-mail: jgthys@gmail.com
 Term Expires: 2017

Name: Marcia Rogers
 Address: 2201 Ridgeway Dr SE
 City & Zip Code: Cedar Rapids, IA 52403
 County: District VIII-Linn
 Phone: 319.395.9777
 E-mail: mrrogers@smartlead.com
 Term Expires: 2019

Name: John Swanson
Address: 1529 Bilgarie Court NE
City & Zip Code: Cedar Rapids, IA 52402
County: District IX-Linn
Phone: 319-363-4629
E-mail: jws ltd@msn.com
Term Expires: 2017

Advisory Council

Older Americans Act Section 306(a)(6)(D). Each area agency on aging shall establish an advisory council consisting of older individuals (including minority individuals and older individuals residing in rural areas) who are participants or who are eligible to participate in programs assisted under this Act, family caregivers of such individuals, representatives of the business community, local elected officials, providers of veterans' health care (if appropriate), and the general public, to advise continuously the area agency on aging on all matters relating to the development of the area plan, the administration of the plan and operations conducted under the plan.

Older Americans Act Code of Regulations, Subpart C, Sec. 1321.57(b) Composition of Council. The council shall include individuals and representatives of community organizations who will help to enhance the leadership role of the area agency in developing community-based systems of services. The advisory council shall be made up of:

1. More than 50 percent older persons, including minority individuals who are participants or who are eligible to participate in programs under this part;
2. Representatives of older persons;
3. Representatives of health care provider organizations, including providers of veterans' health care (if appropriate);
4. Representatives of supportive services provider organizations;
5. Persons with leadership experience in the private and voluntary sectors;
6. Local elected officials; and
7. The general public.

If the agency's Advisory Council does not currently meet all 7 composition criteria listed above, provide the following information:

- 1) Composition criteria yet to be satisfied by the Council (# 1, 2, 3, 4, 5, 6, 7)

N/A – The Heritage Area Agency on Aging currently meets all seven composition criteria.

Advisory Council for The Heritage Area Agency on Aging
Updated on: 4-22-16

Chair

Name: NancyLee Siebenmann
Address: 336 Trailridge Rd SE
City & Zip Code: Cedar Rapids, 52403
County: Linn
Phone: 319-365-4117
E-mail: 319-365-4117
OAA Composition Criteria (1 to 7): 1,2,4,5,7
Term Expires: 6/30/2017

Secretary/Secretary Treasurer

Name: Sjonna Brunt
Address: 6301 Kirkwood Blvd SW
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County: n/a
Phone: 319-398-5559
E-mail: sjonna.brunt@kirkwood.edu
OAA Composition Criteria (1 to 7):
Term Expires: n/a

Other Members:

Name: Rex Shepherd
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City & Zip Code: Vinton, 52349
County: Benton
Phone: 319-472-4854
E-mail: none
OAA Composition Criteria (1 to 7): 1,2,4,5,7
Term Expires: 6/30/2019

Name: Dennis Haas
Address: 2935 170th Street
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County: Iowa
Phone: 319-662-4269
Email: drhaas@southslope.net
OAA Composition Criteria (1 to 7): 1,2,7
Term Expires: 6/30/2022

Vice Chair

Name: Evans Waller
Address: 1726 Taylor Avenue
City & Zip Code: Bennett, 52721
County: Cedar
Phone: 563-893-2485
E-mail: elwaller39@aol.com
OAA Composition Criteria (1 to 7): 1,2,5,7
Term Expires: 6/30/2019

Treasurer (if separate officer)

Name:
Address:
City & Zip Code:
County:
Phone:
E-mail:
OAA Composition Criteria (1 to 7):
Term Expires:

Name: Shirley Gadelmann
Address: 1730 170th Street
City & Zip Code: Clarence, 52216
County: Cedar
Phone: 563-452-4183
E-mail: none
OAA Composition Criteria (1 to 7): 1,2,3,5,7
Term Expires: 6/30/2022

Name: Kice Brown
Address: 203 W Pioneer Road
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County: Johnson
Phone: 319-629-5524
E-mail: kice@iowatelecom.net
OAA Composition Criteria (1 to 7): 1,4,5,6,7
Term Expires: 6/30/2018

Name: Lynne Cannon
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 County: Johnson
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 E-mail: lcannon920@gmail.com
 OAA Composition Criteria (1 to 7): 1,2,5,7
 Term Expires: 6/30/2017

Name: Larry Kudej
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 County: Johnson
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 OAA Composition Criteria (1 to 7): 1,5,7
 Term Expires: 6/30/2019

Name: Robert Welsh
 Address: 84 Penford Dr
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 County: Johnson
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 OAA Composition Criteria (1 to 7): 1,2,5,7
 Term Expires: 6/30/2021

Name: Shawn Zierke
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 County: Johnson
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 OAA Composition Criteria (1 to 7): 2,4,5
 Term Expires: 6/30/2018

Name: Lisa Tallman
 Address: 112 N Ford Street
 City & Zip Code: Anamosa, 52205
 County: Jones
 Phone: 319-462-4484
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 OAA Composition Criteria (1 to 7): 2,4,5,7
 Term Expires: 6/30/2020

Name: Sandra Bell
 Address: 5665 Cornell Street SW
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 County: Linn
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 E-mail: sdemowiz@aol.com
 OAA Composition Criteria (1 to 7): 1,2,5,7
 Term Expires: 6/30/2017

Name: John Elliott
 Address: 6312 Quail Ridge Drive SW
 City & Zip Code: Cedar Rapids, 52404
 County: Linn
 Phone: 319-396-4762
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 OAA Composition Criteria (1 to 7): 1,2,5,7
 Term Expires: 6/30/2017

Name: Judy Fries
 Address: 1421 28th Street SE
 City & Zip Code: Cedar Rapids, 52403
 County: Linn
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 OAA Composition Criteria (1 to 7): 1,2,5,7
 Term Expires: 6/30/2017

Name: Jim Wasta
 Address: 3805 Willowbend Court NE
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 County: Linn
 Phone: 319-294-8484
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 OAA Composition Criteria (1 to 7): 1,2,5,7
 Term Expires: 6/30/2021

Name: Sallie Streib
 Address: 614 Green Valley Ter. SE
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 County: Linn
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 E-mail: steibe@msn.com
 OAA Composition Criteria (1 to 7): 1,5,7
 Term Expires: 6/30/2021

LifeLong Links Advisory Council

The Heritage Area Agency on Aging

Chair

Name: John Brandt
Address: 1240 26th Ave Ct SW
City & Zip Code: Cedar Rapids 52404
County: Linn
Phone: (319) 892-5610
E-mail: John.brandt@linncounty.org
Term Expires: 6/30/2016

Vice-Chair

Name:
Address:
City & Zip Code:
County:
Phone:
E-mail:
Term Expires:

Secretary

Name: Eugenia Vavra
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Term Expires: Ongoing

Treasurer (if separate officer)

Name:
Address:
City & Zip Code:
County:
Phone:
E-mail:
Term Expires:

Other Members

Name: Rusty Goins
Address: 1240 26th Ave Ct SW
City & Zip Code: Cedar Rapids 52404
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Term Expires: 12/31/2016

Name: Stephanie Beary
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Term Expires: 6/30/2016

Name: Elizabeth Boenish
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Term Expires: 12/31/2016

Name: Jordan Cullen
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Term Expires: 12/31/2017

Name: Mandy Ellison
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Term Expires: 6/30/2016

Name: Jena Maloney
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Term Expires: 12/31/2016

Name: Pat Giorgio
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 Term Expires: 12/31/2016

Name: Kathy Horan
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 County: Linn
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 Term Expires: 12/31/2016

Name: Lisa Nelson
 Address: 200 Clive Dr SW
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Name: Kathy Olson
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 Term Expires: 06/30/2018

Name: Melissa Pence
 Address: 317 7th Ave
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 Term Expires: 12/31/2017

Name: Tiffany Overath
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 Term Expires: 12/31/2016

Name: Chris Juett
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 Term Expires: 6/30/2017

Name: Toni Claussen
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 County: Linn
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 Term Expires: 06/30/2018

Name: Joanna Shade
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 Term Expires: 6/30/2016

Name: Kelly Schneider
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 Term Expires: 12/31/2016

Name: Tom Hardecopf
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 Term Expires: 06/30/2016

Name: Don Tyne
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 Term Expires: 6/30/2017

Name: Allison Walker
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Term Expires: 6/30/2017

Name: Carlos Vega
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Term Expires: 6/30/2016

Name: Chris Wolf
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Term Expires: 6/30/2017

Name: Nick D'Amico
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City & Zip Code: Cedar Rapids
County: Linn
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Term Expires: 06/30/2018

Name: Amy Lepowsky
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City & Zip Code: Cedar Rapids 52405
County: Linn
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Term Expires: 06/30/2018

Name: Melissa Morford
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Term Expires: 6/30/2017

Name: Deb Schultz
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Term Expires: 6/30/2018

Name: Jerad Nylin
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City: Cedar Rapids
County: Linn
E-mail: jnylin92@gmail.com
Term Expires: 06/30/2018

Name: Mike Lightbody
County: Regional
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E-mail: Michael-lightbody@uiowa.edu
Term Expires: 06/30/2018

Public Hearing

Agency staff have reviewed the Iowa Administrative Code on public hearing requirements and have determined that the updated information provided does not necessitate a public hearing. (No additional information is required.)

OR

Agency staff have reviewed the Iowa Administrative Code on public hearing requirements and have determined that the updated information provided required a public hearing. Public hearing documentation appears below.

[Insert public hearing documentation as instructed in the FY2016-2017 Area Plan on Aging Update Instructions.]

N/A

Section 5: Area Profile - Staffing / Coverage

Table of Organization

Service Coverage by County

Nutrition Services and OAA Providers

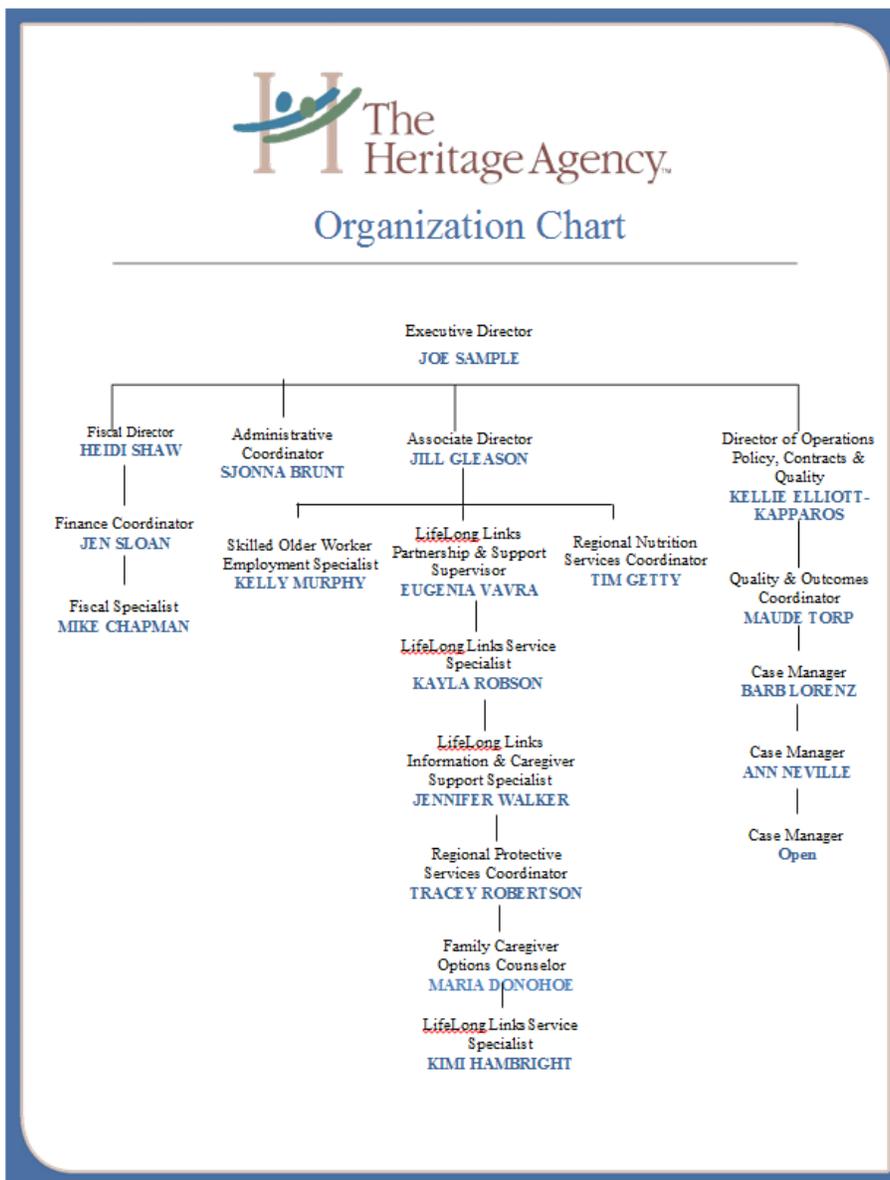
Request for Direct Service Waiver

Service Planning and Data Reporting Performance Measures

Table of Organization

There are a number of unknowns that Heritage is working through related to staffing at this time. Heritage has experienced a level of turnover the last six months that we have not had for many years. Medicaid Managed Care is related directly or indirectly to much of this change. Heritage currently has a Case Management position open that we will be carefully assessing to determine if we need a third case manager or possibly more based on the level of consumers we serve under those contracts. Also factoring in and will be evaluated over the next quarter is the potential need for an additional fiscal staff member if MCO billing activities warrant such. MCO revenue will need to be such to cover the expense of these potential positions.

Another unknown is related to the Harmony database and who conducts the updates. Staff time may need to be reallocated if this is a function no longer conducted at the area agency on aging level.



OAA Service Coverage by County

[Insert an X to indicate the service in offered in the county.]

Mandatory & Other Services	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
Case Management	X	X	X	X	X	X	X
Congregate Meals	X	X	X	X	X	X	X
Health Promotion	X	X	X	X	X	X	X
Home Delivered Meals	X	X	X	X	X	X	X
Information & Assistance	X	X	X	X	X	X	X
Legal Assistance	X	X	X	X	X	X	X
Nutrition Counseling	X	X	X	X	X	X	X
Nutrition Education	X	X	X	X	X	X	X
Options Counseling	X	X	X	X	X	X	X
Other Service(s)							
Adult Day Care/Adult Day Health	X	X	X	X	X	X	X
Evidence-Based Health Activities	X	X	X	X	X	X	X
Outreach	X	X	X	X	X	X	X
Chore						X	
Transportation	X	X			X	X	

Heritage’s Request For Proposal (RFP) outreach has only identified one Chore provider interested in applying for funding. Aging Services provides Chore in Linn County through a Heritage contract. Due to the costs of this service and the available funding, other providers have reported that it is too expensive to offer or are not willing to provide service in the rural counties. Chore is a much needed service in our area, but there are few options for those that cannot afford to pay privately. Heritage continues to discuss the need for Chore services and does the best we can to identify other potential partners.

Heritage currently funds volunteer mileage reimbursement to volunteer transportation programs that are housed within four (4) of our seven (7) counties and continue to explore options in the other three counties. Those providers are: Aging Services (Linn County), Southeast Linn Community Center (Linn County), Benton County Volunteer Program (Benton County), Volunteer Services of Cedar County (Cedar), and Jones County Volunteer Center (Jones County). **The service of transportation is provided through both Assisted Transportation and Transportation taxonomy definitions. The chart above reflects both taxonomy definitions. It is important to note that the chart below reflects the county in which the service provider is based out of. Some of our five providers (under assisted transportation and/or transportation) will travel outside of their home county based on client need.**

Heritage is able to coordinate regional service through collaboration and partnership despite limited funds. Most of our partner providers will transport within and outside of the county in which they are housed based on the individual need and available funds and volunteers.

Heritage currently funds volunteer mileage reimbursement to volunteer transportation programs that operate within two (2) of our seven (7) counties. Those providers that specifically are operating under Assisted Transportation beginning in Fiscal Year 2016 are Benton County Volunteer Program (Benton County) and Jones County Volunteer Center (Jones County). Benton County Volunteer Program and Jones County Volunteer Center require their volunteers to serve as an escort because it is a priority of their programs and makes operational sense due to the fact that they are providing long trips, typically outside of the county in which they are housed.

Nutrition Services and OAA Providers

Please confirm that the information detailed below is current in the IAPRS for your agency.

Nutrition Services

Agency staff have reviewed the following Nutrition Services information entered into IAPRS and verify that the information is current as of **4/28/16**.

Nutrition Services information to be verified for accuracy includes:

- Location: Name, Street Address, City, Zip
- Frequency

Contracts with Service Providers of OAA Services

Agency staff have reviewed the contracted Service Provider information entered into IAPRS and verify that the information is current as of **4/28/16**.

Aging Services, Inc.	Adult Day Care
Aging Services, Inc.	Chore
Aging Services, Inc.	EAPA
Aging Services, Inc.	Respite (in-home & facility based)
Aging Services, Inc.	Transportation
Benton County Volunteer Program	Assisted Transportation
Elder Services, Inc.	EAPA
First Call for Help Iowa, Inc.	Information & Assistance
Jones County Volunteer Center	Assisted Transportation
Martha Quint	Legal Assistance
Pentacrest, Inc.	Adult Day Care
Southeast Linn Community Center	Transportation
Volunteer Services of Cedar County	Respite
Volunteer Services of Cedar County	Transportation
Wesley Community Services, Inc.	Adult Day Care
Wesley Community Services, Inc.	Respite

Direct Service Requests

The request(s) to provide direct service(s) submitted with the FY2016 – 2017 Area Plan on Aging are **current**. (No additional information is required.)

OR

The agency seeks to provide additional service(s) directly in the planning and service area in FY2017. Submit a completed Request to Provide Direct Service form for each new direct service the agency plans to provide in FY2017.