



The Heritage Area Agency on Aging

PSA 4

Area Plan on Aging

SFY 2014 - 2015

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SFY2014-2015 Area Plan on Aging**

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Section 1. Executive Summary

With more than 40 years of experience, The Heritage Area Agency on Aging (HAAA) is the leader in planning, advocating, coordinating, and funding programs that serve the 78,798 (2010 US Census) older adults in Benton, Cedar, Iowa, Johnson, Jones, Linn, and Washington counties.

HAAA has an extensive history of cutting edge development of innovative programs and development of service delivery systems that address the identified needs of consumers. Over the last four decades, HAAA has initiated many pioneering systems for planning, funding, and advocating for the needs of older adults and more recently for adults with disabilities. These concepts were born from a dedication to creating customer-friendly service delivery systems, enhancing collaboration within the aging and disability network, and reducing fragmentation and duplication of services within the local community.

HAAA's strategy for understanding and addressing consumer need includes three key drivers. It is crucial to understand who is being served and who still needs to be reached. It is equally important to know if the mandatory core services and other allowable services that are currently being provided are meeting the needs of consumers and potential consumers in the Planning and Service Area (PSA). Each of these three areas of focus is essential to the mission and purpose of the agency.

HAAA shall utilize a combination of past successful strategies and new approaches in gathering information about consumers in the PSA. Previous methods of data gathering have provided a general understanding of the consumers being served in comparison to the general population. HAAA will gather mandatory "core" and other services to better understand who is currently being served, what the needs of those being served are, and what services current consumers are using the most. HAAA will set an annual or periodic goal that is directly tied to the information gleaned from the various methods for identifying and tracking consumer need. The goal will be formed with input from staff, Advisory Council, Task Forces, and program advisory committees and will permeate all of the agency functions and leadership teams.

- Needs Assessment Activities and findings will utilize:
 - Current Consumer Needs: NAPIS, Task Force/Advisory Council, Experience Surveys and Collaboration
 - Target/Special Population Needs: Comparisons to Census Data, Needs Assessments, Focus Groups and Targeted Questionnaires
 - Consumer/Target Population Unmet Needs and Service Gaps: Unmet Needs Tracking System

HAAA has worked diligently to maximize resources and increase efficiencies in the local service delivery system. Contracting with local providers has increased the number of affordable choices for care available for consumers in the service area, created a more collaborative (rather than competitive) relationships within the local aging and disability network, and has maximized funding by spreading out operating costs and enhancing the use of other community funds and other grants.

- Addressing Significant Needs
 - Continue successful strategy of collaboration and involving strong partnerships with key local, state, and federal organizations and individuals.
 - Reassessing of priority services to the HAAA PSA based on significant needs.

Iowa's first Aging and Disability Resource Center (ADRC) began as pilot projects in the HAAA service area. One local partner provider was selected to work closely with HAAA in developing this new type of service to be used as a model in Iowa. Later, funding channels shifted and Area Agencies on Aging became the entities eligible for grants to launch ADRC programs. HAAA applied for and was awarded grants related to piloting the ADRC program and defining Options Counseling (OC). This enabled HAAA to be at the forefront in Iowa for creating state-wide standards for the service, streamlining access to care for all people, all payers, and further defining the position of Options Counselor. In the years since the grants were awarded, HAAA is recognized in the PSA as the visible and trusted single point of entry for information on public long term support programs and benefits for all adults of all incomes.

Although, this concept of “no wrong door/single point of entry” is not new to HAAA, HAAA will continue to position the ADRC in the PSA, as it is a major goal of Iowa’s new Balancing Incentives Payment Program (BIPP) Grant.

HAAA continues to work closely with Iowa Department on Aging in continued ADRC development. HAAA looks toward future growth activities to develop and implement a model for delivering the Veteran Directed-Home and Community Based Services (VD-HCBS) program in the HAAA ADRC service area. The model will be used in the expansion of the Veteran’s Directed – Home and Community Based Services (VD-HCBS) into additional ADRC service areas.

HAAA has long recognized that the needs of older adults, adults with disabilities, and the caregivers and professionals that work with them are becoming increasingly complex in nature. A large majority of consumers enter the Aging Network and service delivery system in crisis. Through the targeted key initiatives outlined below, coupled with current and future caregiver program activities, HAAA is able to better meet consumer needs that encompass the complicated preferences and values that impact action planning.

- Key Initiatives
 - Aging and Disability Resource Center (ADRC)
 - Case Management
 - Nutrition Services
 - Caregiver Education
 - Evidence-based programming
 - Expansion of HAAA portfolio relating to diversified funding services including expansion into fee-for-service.
- Caregiver activities
 - Modernizing the program to better meet the needs of this changing demographic and challenges of family caregivers.
 - Building upon initial relationships with providers of children’s services, expanding social media outreach, emotional supports, creation and facilitation of support groups, collaboration with referral systems and evaluating trends.

In summary, HAAA has a wide range of experience in the development of innovative program and service delivery systems that address the needs of consumers. HAAA’s strategies and experiences have far reaching relevancy. Programs and systems used in the HAAA service area have been and can be built upon and replicated in other communities throughout the State.

Section 2. Organizational Structure

HAAA, a department of Kirkwood Community College, is proud to serve as the Area Agency on Aging through the designation by the Iowa Department on Aging in Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties. Under the rules and regulations of the Older Americans Act, HAAA also operates under federal law as a “separate organizational unit within a multi-purpose agency which functions only for purposes of serving as the area agency on agency.” 45 C.F.R. § 1321.55. The multi-purpose entity is Kirkwood Community College.

HAAA serves the needs of older adults, people with disabilities, caregivers and their families in the following ways:

- Planning: Developing and implementing plans that identify and meet the needs of older adults and other individuals we serve in our seven-county region.
- Funding: Obtaining federal, state, and other (i.e.; grants, etc.) funding for programs that benefit older adults, people with disabilities and caregivers.
- Advocating: Standing strong for the needs of older adults and populations we serve at the national, state and local levels.

The vision/objectives of HAAA are:

- to secure and maintain maximum independence and dignity in a home environment for older persons capable of self-care with appropriate supportive services; and,
- to remove individual and social barriers to economic and personal independence for older persons.

The Kirkwood Community College Board of Directors (Trustees) is the legal entity for HAAA. The Board of Trustees is comprised of individuals representing the entire area serviced by HAAA, including Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties. As a group, the Board of Trustees is charged with setting policy for the college and ensuring the effectiveness of the institution by monitoring and evaluating strategic initiatives and financial direction of the college. Although Kirkwood through its Board of Trustees has ultimate authority over the departments of the college, including HAAA, Kirkwood recognizes the autonomy of HAAA's Executive Director and Advisory Council to exercise all the necessary functions under the Older Americans Act and Iowa law. They further acknowledge that HAAA is governed by the Advisory Council and managed by the Executive Director. Furthermore, to ensure proper oversight and to delegate this authority to the HAAA volunteer leadership structure, the Board of Trustees review proposed membership slates for each of the seven county Task Forces, which identifies possible Advisory Council members that will be granted this governance authority each year for their approval. This organizational structure as the Older Americans Act allows, requires the governing body of the multipurpose entity (HAAA's Advisory Council) to be responsible to the State unit on aging for the administration and operation of the aging programs under the multiyear Area Plan.

This structure has served the region well for more than 40 years. In addition to Area Plan goals and outcome measures, HAAA is part of the Kirkwood Community College community service mission to support and provide services to the community and have a positive impact on the region.

HAAA organizational volunteer leadership and oversight structure begins at the local level. Each of the counties served by HAAA has a Task Force on Aging. Each county Task Force is a committee of grassroots advocacy volunteers. They are convened by and serve as an extension of HAAA. The mission of a county Task Force is to provide grassroots assistance to HAAA in its efforts of advocacy, planning, and funding. This is accomplished through determining the needs of older persons; promote new and existing programs and policies that address the needs in planning, funding and advocating for older adults, caregivers, and people with disabilities. Each Task Force elects willing and qualified representatives to The HAAA Advisory Council and the regional standing committees.

Every county served by HAAA is represented on the Advisory Council and is elected through the county Task Force structure. The HAAA Advisory Council's mission is to provide volunteer leadership in the planning, funding and advocating for older adults, caregivers, and people with disabilities. As the governing body of HAAA, this group works in the development and administration of the Area Plan, conducting public meetings that are related to aging and disability issues, representing the ongoing interests of older persons and people with disabilities residing in the HAAA region and to review and comment on community policies, programs and actions which affect older persons and people with disabilities as appropriate with the intent of assuring maximum coordination and responsiveness. Representatives need to be diverse, knowledgeable and dedicated.

The Advisory Council is composed of twenty two (22) possible voting member slots representing the Task Forces and up to three (3) additional appointed voting members representing the following areas, if criteria is not satisfied through the Task Force elected members: Representative of health care provider organization, including providers of veterans' health as appropriate; Representative of supportive services providers organizations; Local elected official.

In the event appointments are necessary to be made to be compliant with agency by-laws, Older Americans Act regulations or any other state or federal law, they will be considered at-large appointments, representing all seven (7) counties served. Appointments are made by the Executive Director or Chair with all practical effort made to rotate the county from which the individual(s) reside.

Each Task Force is entitled to a fixed number of members. Benton, Cedar, Iowa, Jones and Washington counties all have two (2) members each, Johnson can have four (4) members and Linn can have eight (8) members. Members and alternates are selected according to the processes outlined in the Task Force by-laws.

There are currently no appointed members to the Advisory Council because all requirements of the Older Americans Act have been achieved through membership recruitment and outreach efforts. HAAA staff liaisons to the Task Forces, Task Force Chairs and volunteers recruiting members consider these requirements in their annual and ongoing efforts.

Each Task Force recruits a diverse membership of older adults, caregivers, professionals and members of the public to ensure they will be able to fully represent their community at the regional Advisory Council level. Representatives need to be knowledgeable, motivated to be involved and dedicated. Advisory Council members are provided with a minimum of four hours of training annually as required by Iowa Code.

This volunteer leadership structure allows for members to take an active role in directing policy and advocacy in the following ways:

- Volunteer structure empowers HAAA to best serve the region by having "boots on the ground" in each county,
- Involving grassroots constituents in the advocacy, planning, and funding work of HAAA at all levels,
- Identifying unmet needs and advocating for resources needed to meet those needs at all levels,
- Acting as a conduit of information for and with HAAA and increasing the visibility and presence of HAAA in each county,
- Assisting to meet HAAA Area Plan goals by planning and undertaking projects that improve the lives of older adults and their caregivers in a county,
- Developing and supporting volunteer leadership,
- Increasing the skills and involvement of volunteer advocates in older adult and disability related issues and the programs that address them,
- Ensuring the long-term viability of programs, especially those funded by the Older Americans Act,
- Collaborating with other organizations in a county as appropriate to achieve common goals,

Task Force members are generally identified and recruited by current members or they reach out to the Task Force to ask to join because they are one or more of the following:

- Active Community Volunteers
- Advocates
- Professionals
- People with expertise to enrich knowledge
- Current members of the County Board of Supervisors and other local elected officials

The Advisory Council has four standing committees and currently one ad hoc committee to expand their knowledge and expertise. Those committees are the Planning, Program and Budget Committee, the Community Relations Committee, the Advocacy/Government Liaison Committee, the Resource Development Committee and (ad-hoc) the Nutrition Subcommittee. All committees report regularly to the full Advisory Council. In addition, the current Executive Director has begun to meet monthly with the Chairs and Vice Chairs of the Advisory Council and the Planning, Program, and

Budget Committees as an informal executive group. This has provided an additional layer of oversight and communication with the volunteer leadership structure.

HAAA operates according to Kirkwood's general policies, financial policies, personnel policies and procedures which provide for the hiring and firing of HAAA employees including the Executive Director. The practice of Kirkwood Community College has traditionally been that when an opening in the position of Executive Director has occurred, the Vice President of the College has reached out to stakeholders to review applicants, including representatives of the Advisory Council. Invited members of the Advisory Council have been active and valued participants in the hiring process and considered a critical part of the review team. Those invited members are encouraged to discuss hiring progress with the rest of the Advisory Council as appropriate and within the human resource legal limits.

The current Executive Director of HAAA, Ingrid Wensel, reports to the Kirkwood Community College Vice President and Chief Financial/Operation Officer, Jim Choate, who reports to Dr. Mick Starceovich, President of the college, and ultimately the Kirkwood Community College Board of Trustees. All HAAA staff are Kirkwood Community College employees who report to the HAAA Executive Director. All employees are reviewed at least annually with quarterly performance goal updates with their supervisor.

Performance of the organization is monitored in a variety of ways within the Kirkwood Community College structure and volunteer leadership. As a department of Kirkwood Community College, there are a great number of checks and balances in all areas of financial applications, budgeting, human resources, compliance, legal, and community impact.

The Executive Director meets regularly with the Kirkwood Community College Vice President to discuss agency activities, funding projections, advocacy issues, progress in relation to agency goals, and more. There is a continuous flow of communication between HAAA and Kirkwood that ensures fiscal responsibility, active partnership, oversight and evaluation.

HAAA's Executive Director and organizational performance is also under the governing oversight of the Advisory Council. The HAAA Advisory Council's mission is to provide volunteer leadership in the planning, funding and advocating for older adults, caregivers, and people with disabilities. The Advisory Council evaluates performance of the agency through active participation and effective governance. This includes the development and administration of the Area Plan, conducting public meetings that are related to aging and disability issues, representing the ongoing interests of older persons and people with disabilities residing in the HAAA region and to review and comment on community policies, programs and actions which affect older persons and people with disabilities as appropriate with the intent of assuring maximum coordination and responsiveness.

Advisory Council meetings occur in most calendar months and are open to the public under open meetings law. These regular meetings provide members the opportunity to discuss, review and question financial and program reports, subcontractor and agency performance, obtain updates on agency and programmatic activities, provide policy input, and to ensure HAAA is being managed effectively and appropriately.

Due to the nature of HAAA's structure, evaluation of all areas of performance is far reaching and diverse. Evaluation and oversight is at the local/community level through the County Task Forces, governance oversight at the regional level through the Advisory Council and committees of the council, at the departmental level as HAAA, at the Kirkwood Community College level and finally with the Board of Trustees.

HAAA benefits from the name recognition and fine reputation of Kirkwood. Kirkwood benefits from the involvement of older adults and people with disabilities in college activities and their support of the college because of their relationship with HAAA. Over the years, the relationship between HAAA and Kirkwood Community College has been one of mutual respect, support and trust. It speaks to the quality of leadership and integrity present at both the HAAA and Kirkwood levels.

Section 3. Area Plan Development

It is the policy and practice of HAAA to ensure input on the development of the Area Plan, including priority services. HAAA obtains input for the development of the Area Plan in a variety of formal and informal means with the goal of obtaining feedback from the public on what should be considered priority services to assist older adults to remain in their homes and maintain their dignity and independence. HAAA utilized tools and methods to ensure priority for delivery of services was determined and followed according to all applicable laws and regulations for the Area Plan. These tools included public hearings, INAPIS registration, program intake and assessment tools, community partnerships, multidisciplinary team meetings and advisory groups, County Task Forces, HAAA's Advisory Council, community volunteer involvement, local, state, and national involvement in the aging network.

HAAA provided advance notification on the development of the Area Plan in area newspapers, through email distribution lists, which included advocates, volunteers and subcontractors, and on our website www.heritageaaa.org. Opportunities for official and formal input from the public on the Area Plan and priority services were offered through public hearing meeting and a written public input form that was distributed (sample attached). The public hearing was also held on Wednesday, March 13, 2013 at HAAA. Notice of the public hearing was released thirty (30) days in advance and was held at a reasonable time and at a barrier-free location that provided older persons, public officials and other interested parties reasonable opportunity to participate (documentation attached).

HAAA obtains feedback and the organizational structure of the agency facilitates year round input through the Task Forces on Aging. Each county served by HAAA has a county Task Force to gather information on the needs of each of the counties and small communities in the region. County Task Forces on Aging were created by HAAA to allow consumers, potential consumers, interested community members, and local providers of service to work together to understand the needs of the county. Task Force duties and responsibilities include program planning, resource development, community advocacy and information sharing. Task Force members and their representatives on the Advisory Council, help HAAA to make the most appropriate and valuable choices for use of resources and help focus the agency advocacy and planning activities where they are most needed.

Additionally, the HAAA Advisory Council approved the Area Plan on March 28, 2013. The mission of the Advisory Council is to provide volunteer leadership and governance in the planning, funding and advocating for older adults, caregivers, and people with disabilities. This includes the development and administration of the Area Plan, conducting public meetings that are related to aging and disability issues, representing the ongoing interests of older persons and people with disabilities residing in the HAAA region and to review and comment on community policies, programs and actions which affect older persons and people with disabilities as appropriate with the intent of assuring maximum coordination and responsiveness. All members of the Advisory Council are also members of their local county Task Force, unless otherwise appointed by the council to ensure compliance with the composition requirements of the Older Americans Act.

- HAAA solicited input for development of the plan through:
 - Public Hearing
 - Written Comments accepted
 - Postings made to the HAAA Webpage

- Notices posted in area newspapers
- Notices sent to subcontractors, Task Force members and other partners

In addition to public input through the formal process described above, HAAA's complete and comprehensive strategy for understanding and addressing consumer need through priority services administered through the Area Plan includes three key drivers. Each of these three areas of focus is essential to the mission and purpose of HAAA: 1. Current Consumer Needs obtained through INAPIS, Task Forces and Advisory Council, Client Experience and Satisfaction Surveys, Collaboration; 2. Target/Special Population Needs; 3. Consumer/Target Population Unmet Needs and Service Gaps.

Previously available information through the National Aging Program Information System (NAPIS), 2010 Census Data, program reports, surveys, testimonials from Task Forces, funding requirements, and professional literature and studies have been the catalysts for HAAA's planning, funding, and advocacy decisions in the development of the Area Plan. A great deal is already known about consumer needs, service gaps, and about the target population in the HAAA region and these factors have been considered in the development of the Area Plan, such as:

- Iowa's population is getting older.
- Many of the consumers accessing services through the Area Agency on Aging are of low income and/or living below the poverty level.
- Consumers are accessing services later and often at the point of a health, financial, and/or legal crisis. Consumer's needs are more complicated requiring more expertise and flexible interventions.
- Some services may be "gateway" services or services that are more acceptable to older adults to access before others. Examples of these services may be emergency response systems, home delivered meals, chore services like lawn care and snow removal, and/or homemaking services.
- Many older adults and people with disabilities are relocating from rural Iowa to urban settings. This is true even within the HAAA Region as five of the seven counties are defined as rural.
- Iowa is not a largely diverse state but the numbers of older adults and adults with disabilities who are of defined minority status and/or are Non-English speaking is growing.
- The service needs and desires of older adults and adults with disabilities are changing.
- Caregivers are more valuable than ever to families and to the home and community based service network.
- Dependent adult abuse and elder abuse is a growing problem. Current laws do not fully address the vast array of complicated problems related to the abuse, neglect, self-neglect, and exploitation of older adults and adults with disabilities.

Information on known consumer need presents through all means discussed above serves as a great deal of justification for this Area Plan. From the planning aspect the information above demonstrates the need to plan for capacity in the Aging Network. HAAA has taken steps to do this by setting up a service delivery system based on contracting and partnering with existing local providers for the purpose of growing existing services, avoiding duplication, maximizing resources, and providing more choice for consumers. The development of the Area Plan is submitted to the Iowa Department on Aging and done with full opportunity of input to determine the priority services that assist older adults to remain in their homes and maintain their dignity and independence.

The focus areas addressed by the Area Plan and their associated implementation strategy to ensure the delivery of core services includes providing some services directly and others by working through partnerships and funding relationships within the regional aging network.

HAAA awards funding contracts through the RFP process. Biannually, HAAA requests funding applications from local service providers for services to persons age 60 and older in the HAAA service area with an annual update. HAAA made a number of changes in the most recent RFP cycle process based upon guidance given on the competitive bid process with

the intent of providing an opportunity for a more diverse group of applicants and additional options to consider, as well as demonstrate that we are responsible with limited Older Americans Act dollars to provide quality services in a cost effective manner.

Specific areas of focus and program activities addressed in the Area Plan include Older Americans Act core programs, evidence based disease and prevention programs, participant directed/person centered planning and elder rights.

Older Americans Act Core Programs

- *Congregate Meals & Home Delivered Meals* – Currently, HAAA works collaboratively with Congregate Meal providers and Home Delivered Meal providers with some doing both. HAAA has released a Request for Proposal (RFP) covering the Congregate and Home delivered Meal program for Fiscal Years 2014 and 2015. The process was revised in order to explore partnerships with a more diverse group of providers and expand the opportunity to complete a RFP, demonstrate cost effectiveness, and maximize resources for the Nutrition Program. The strategic service implementation plan is to continue this model of service delivery based upon available funding.
- *Case Management Program for the Frail Elderly (CMPFE)* –HAAA will continue to offer case management services to both Elderly Waiver eligible and non-waiver eligible older adults in each county of the service area. Program administration is fully provided through HAAA but subcontracts are given to provide case managers in Linn, Benton, and Jones counties. HAAA also directly employs case managers to cover clients in counties without subcontractors and special populations in each county of the service area. Subcontracts are awarded with careful consideration of the applicant's ability to meet requirements and standards for Elderly Waiver Case Management and CMPFE. CMPFE administrative staff provide ongoing quality assurance and monitoring of both the internal and external program staff and cases. CMPFE staff will continue to collaborate with other HAAA programs, contractors, and local providers of services with the overall goal of assisting clients in gaining access to needed services and supports and reducing their risk of premature institutionalization. CMPFE case managers will continue to assess individual client need, plan for care-including emergency and crisis planning, monitor service provision, make referrals and set-up services, follow-up on client issues and concerns, and act as a central point of coordination for a client's interdisciplinary team members. Case Managers will ensure that clients are provided choices and are allowed to make informed decisions about their services and providers of service. Case Managers act in the best interest of the client.
- *Health Promotion* – HAAA continues to be a sought after partner with community agencies offering health screenings and assessments. Meal sites and congregate settings are utilized to host community education events that highlight ways to improve behavioral, mental, and physical health. Self-management of chronic conditions is addressed through cost effective strategies, benefits outreach and enrollment activities. HAAA encourages home assessments by some providers, which helps minimize falls in the home.
- *Information and Assistance* - HAAA is working with partners to increase awareness of services available through the Aging Network and Aging and Disability Resource Center (ADRC). HAAA is also working in partnership with stakeholders to identify and implement best practices in relation to call triage, consistency in information provided, AIRS principles, and enhanced program procedures to ensure seamless entry to the HAAA continuum of care. Standardized and detailed policies and procedures are a focus of work over the next few months. HAAA will continue committee work and collaborations with other providers of information and referral, such as FCFH-Iowa, Inc. (First Call for Help Iowa, Inc.) United Way 2-1-1and Linn County Community Services to ensure accurate and comprehensive information is being provided to the community. HAAA's strategy for implementation of the service of Information and Assistance is comprehensive and serves as a "no wrong door" access point to the HAAA continuum of care. HAAA believes that this access is critical and must be available to individuals 24 hours a day, seven days a week. To meet this high of a standard and fully implement this strategy, HAAA's activities include internal and external access points.
- *Legal Assistance* – Currently, HAAA works closely with a local attorney with expertise in elder law and more than 20 years of experience. This service is available to all seven counties and home visits area available. HAAA actively

participates in meetings with IDA, Iowa Legal Aide and other AAA to review current model of delivery of legal services and will continue to do so.

- *Nutrition Counseling-* HAAA is working with partners to ensure services are accessed in our region. This program is currently administered through a sub-contractual agreement, but is under consideration to be provided directly by HAAA beginning in Fiscal Year 2014 to ensure an adequate supply of service in the region.
- *Nutrition Education-* This program is currently administered in conjunction with the service of Congregate and Home Delivered Meals. HAAA produces a health living newsletter several times per year and researched specific nutrition-related topics for each month. The information is distributed to each HDM participant upon meal delivery. Delivery drivers discuss key topics related to the newsletter. It is also distributed at dining sites and the site manager present specific topics of interest. HAAA is planning on using more "Chef Charles" materials and exploring ways to implement cooking demonstrations in selected dining sites.

Evidenced-based disease and prevention programs

- *Chronic Disease Self-Management Program (CDSMP)* – HAAA maintains a strong partnership with Mercy Medical Center to implement the CDSMP. Mercy sustains the CDSMP program financially, as well as coordinates most aspects of the program. HAAA holds the CDSMP license with Stanford and maintains two staff certifications to teach classes and offer trainings. This is a unique partnership that has garnered HAAA/Mercy respect and opportunities through Stanford University.
- *Matter of Balance-* HAAA has two dedicated staff members that have the ability to offer classes and trainings. HAAA participated in the SureSteps Program, funded by Wellmark Foundation and was able to train MOB coaches in Johnson County and offer classes in community settings and senior centers. HAAA staff are often called upon to assist other AAA in evaluating their MOB programs annually.
 - CDSMP and MOB are the highest level criteria to meet the Fiscal Year 2012 requirements for Title IIID funding activities. HAAA continues to be the evidenced based data collector and inputter for several other Area Agencies on Aging, as well as, public health departments in and out of the HAAA region.
- *Powerful Tools for Caregivers* – HAAA's Resources and Caregiver Support Program Coordinator is scheduled to attend training to become a group leader for the Powerful Tools for Caregivers program. HAAA is also serving as a supporting sponsor of the partnership with Iowa State University to establish a community planning group to coordinate and support these classes in Linn County.

Participant Directed/Person-Centered Planning

- *Options Counseling through the ADRC* – As the regional ADRC, a mandate to being a fully functional ADRC is offering the services of trained Options Counselors. This service is delivered through the HAAA region as the single point of entry to long term services and supports for all people, all payers. Since HAAA operated the first ADRC in the State, HAAA has been fundamental in building the benchmark for the state and federal standards related to defining Options Counseling. Because the service of Options Counseling is the link to building a seamless service delivery system with no wrong door, HAAA will continue to develop this implementation strategy.

Elder Rights

- The Elder Abuse Intervention Coalition was created in January 2012 and was established to address the needs of older lowans experiencing or at-risk for abuse, neglect and/or exploitation. Elder abuse is grossly under-recognized and grossly under-reported. It's estimated that 84% of elder abuse cases go unreported and 40% of all elder abuse involves some form of financial exploitation. Research has also shown that elder abuse can dramatically shorten the life of an older victim. The types of elder abuse include the following: physical abuse, sexual abuse, sexual exploitation, financial exploitation, denial of critical care by caretaker, self-denial / self-neglect of critical care, abandonment, and verbal/psychological abuse.

- The Mission of the Elder Abuse Intervention Coalition is to expand and improve elder abuse prevention, protection, and intervention services for older Iowans by raising community awareness and building support for public policies that address the needs of abused older Iowans. The Elder Abuse Intervention Coalition would like to expand membership state-wide and have the Aging Network play a larger role with intervention in elder abuse, neglect, and exploitation cases in the community.
- The Elder Abuse Intervention Coalition's goals are to increase support for the Elder Abuse Intervention Program and state-wide funding for client intervention services; to establish an Iowa Elder Abuse Law to support the tenants of the Older Americans Act; and to reinstate and fully fund the Iowa Office of Substitute Decision Maker.
- There are a total of 20 agencies and advocates who have signed a Letter of Commitment towards the Coalition's goals. Many of the member agencies and individual advocates participated in the 2013 HAAA Agency's annual bus trip to Des Moines to meet with local legislators and were very successful at getting support from many Senators and Representatives for an Elder Abuse Law in Iowa.

Section 4. Profile of Planning and Service Area

Profile:

- HAAA (PSA 4) population demographics consist of the following (per IDA):

Total	60+	60-74	75-84	85+	Square Miles
Population					
432,735	70,815	44,540	18,215	8,060	4,357

- HAAA has had the opportunity and privilege of successfully soliciting and securing resources that have historically surpassed state and federal match requirements. In Fiscal Year 2012, HAAA managed to leverage over \$4 million in cash and non-cash resources to complement Older Americans Act and state funding received from the Iowa Department on Aging (IDA). In Fiscal Year 2013, HAAA is projected to secure over \$3.9 million in funding to meet the state and federal match requirements.
- HAAA has maintained solid and committed relationships within our partner provider network. These relationships have allowed HAAA to leverage the critical non-IDA federal and state resources, local public funds, other local cash, program income and non-cash needed to expand service delivery systems in the current region. Sources of match include but are not limited to: United Way Agencies; Board of Supervisors; City and County dollars; Iowa Commission on Volunteer Service; Regional Medical Centers; fundraising events; membership fees, individual and corporate contributions, volunteer hours of donated service; FPL Energy Duane Arnold Center; interest income; Iowa Department of Public Health; and Community Services Block Grants.
- HAAA has implemented several strategies for the delivery of services over the years and has accomplished many goals addressing the needs of consumers throughout the Planning and Service Area and will continue to do so through a diverse coalition of partners. The most successful strategies involved strong partnerships with key local, state, and federal organizations and individuals. HAAA coordinates services for the Planning and Service Area at the local, state, and national level by providing some services directly and others through partnerships in the Aging Network, disability community, and fellow advocates. HAAA has maintained a philosophy of partnering with existing community services to encourage the growth of a robust community of providers. HAAA has worked with a variety of partners at the local, state, and federal level to create new programs and reach more people. The culture of HAAA is heavily centered on teamwork and collaboration. The idea of partnering with others to meet consumer need is so central to the history and values of the agency that no program or service provided through HAAA has been done without at least one outside partnership.
- HAAA has active collaborations with other area funders, such as United Way, Greater Cedar Rapids Community Foundation, area Boards of Supervisors, and many others. HAAA staff regularly meets with representatives of these organizations to work to address common goals which include increasing access to services, identifying needs, avoiding the duplication of services and/or funding of services, strategic initiative development and resource utilization. One unique example of such an association is with the Kirkwood Community College Foundation. HAAA

has established an endowment called the Older Iowans Fund in conjunction with this foundation. The ultimate goal of the Older Iowans Fund is to secure the future of home and community based services in the HAAA region.

- At the State level, HAAA is and will continue to be active in state associations and advocacy partnerships, such as the American Association of Retired Persons (AARP) and the Iowa Association of Area Agencies on Aging (i4a). HAAA works with these partners in the coordination of services by analyzing data issued, learning more about best practices in service delivery throughout the State, development in state trends and issues, and in the advocacy of many common issues consumers are facing. Additionally, HAAA staff members will continue to participate on state level committees such as the Iowa Association of Area Agencies on Aging (i4a), the State Case Management Coordinators Committee, the State Fiscal Director's Committee, and any groups, Task Forces, and committees that emerge related to Aging and Disability Resource Centers, Elder Abuse, and more.
- Advocacy and educational opportunities continue at the federal level and would continue to be a priority for HAAA in the future. HAAA participates in many national conferences and events with particular emphasis on opportunities that provide an educational element that would have a positive impact on the region and those occasions that present advocacy opportunities with elected officials and policy makers. HAAA has been described by a national advocacy partner as having superior relationships with elected officials at all levels of government.
- HAAA has an extensive history of cutting edge development of innovative programs and development of service delivery systems that address the identified needs of consumers. Over the last four decades, HAAA has initiated many pioneering systems for planning, funding, and advocating for the needs of older adults and more recently for adults with disabilities. These concepts were born from a dedication to creating customer-friendly service delivery systems, enhancing collaboration within the aging and disability network, and reducing fragmentation and duplication of services within the local community.
 - HAAA has participated in many pilot projects addressing trends in aging and disability related work. Many of these initiatives have become models of best practices state-wide or have become part of the core services offered by all Area Agencies on Aging. Most of these have been sustained for many years and have survived through funding struggles and shifts in trends and paradigms.
 - The Case Management Program for Frail Elderly (CMPFE) started as a pilot project in two counties in Iowa with one being situated in HAAA's Planning and Service Area. This innovative program was developed as a result of recommendations from the Senior Living Coordinating Unit (formerly the Long Term Care Coordinating Unit) and was designed to address emerging evidence that, as the availability of home and community based care increased, so did the need for more coordination across systems and amongst service providers. HAAA became one of the first Area Agencies on Aging to participate as a CMPFE provider and has grown the program to serve more than eight hundred frail, older adults in a seven county region.
 - The Elder Abuse Intervention (EAI) program (formerly the Elder Abuse Initiative) was launched by The Department on Aging (IDA) in 2002. HAAA was one of the original Area Agencies on Aging to participate in this grant designed to bring together key members of the community such as the Department of Human Services, law enforcement, county attorneys, and providers of services to older adults into county-based multi-disciplinary teams with the common goal of detecting, reporting, and preventing elder abuse. These teams work together to find creative solutions to individual consumer circumstances. The EAI program also has a service and system coordination component that helps seniors in, or at risk to be in, situations of abuse and neglect to overcome any acute crises and gain needed supports and services. HAAA continues to administer this program which now serves hundreds of older adults facing abuse, neglect, and exploitation. These individuals often do not fit the criteria needed for protection under Iowa's Dependent Adult Abuse Laws. In addition to the hundreds of seniors served over the years, HAAA has grown community involvement in the county multi-disciplinary teams to approximately 45 participants across four counties.
 - HAAA has long recognized that the needs of older adults, adults with disabilities, and the caregivers and professionals that work with them are becoming increasingly complex in nature. A large majority of

consumers enter the Aging Network and service delivery system in crisis and for many that means complicated legal issues related to aging, disability, Medicaid, Medicare, Veteran's benefits and Social Security. Iowa's Legal Aide system is limited in design and capacity to address these concerns so specific to older adults and people with disabilities. HAAA partners with a local attorney who works directly with consumers, caregivers, older adults and professionals in the Aging Network. The same attorney has been serving in this capacity for over twenty years and has become a state-wide expert in legal issues related to older adults and disabled adults. In addition to providing direct legal services to eligible community members, the attorney also hosts a monthly conference call with professionals working in Case Management, Aging and Disability Resource Center, Elder Abuse Intervention, Information and Assistance, and Caregiver Support programs. During these calls, professionals may seek legal guidance and advice for consumer issues and share current events pertinent to legal issues and consumers. HAAA's partner attorney also has an active role on the Elder Abuse Intervention Multi-Disciplinary Teams.

- Iowa's first Aging and Disability Resource Center (ADRC) began as pilot projects in the HAAA service area. One local partner provider was selected to work closely with HAAA in developing this new type of service to be used as a model in Iowa. Later, funding channels shifted and Area Agencies on Aging became the entities eligible for grants to launch ADRC programs. HAAA applied for and was awarded grants related to piloting an ADRC program and defining Options Counseling (OC). This enabled HAAA to be at the forefront in Iowa for creating state-wide standards for the service, streamlining access to care for all people, all payers, and further defining the position of Options Counselor. In the years since the grants were awarded, HAAA is recognized in the Planning and Service Area as the visible and trusted single point of entry for information on public long term support programs and benefits for all adults of all incomes.
- In 2006, HAAA was one of three Area Agencies on Aging in the state selected by Iowa Department on Aging (IDA) to pilot an evidenced based wellness program, known as Iowa Healthy Links/Better Choices, Better Health in Iowa. HAAA partnered with Healthy Linn Care Network, an arm of the Linn County Health Department, for the three year pilot to offer Chronic Disease Self-Management Program (CDSMP) classes to seniors in the HAAA region. By 2009, HAAA and Healthy Linn Care Network educated over 120 seniors with chronic conditions on improving healthy behaviors, health status and on decreasing days in a hospital or time spent within the care of a primary medical provider. Class activities included goal setting, action planning, and feedback from peers and trained class leaders. Approximately 50 area volunteer leaders were taught through a "train-the-trainer" model to facilitate CDSMP classes in their communities.
- HAAA has taken a lead role in ensuring that Medicare eligible adults in the services area have the information and resources needed to get the most out of their Medicare benefits. HAAA continues its long-standing partnership with the Senior Health Insurance Information Program (SHIIP) to provide outreach and individual consultations on Medicare and other insurance related issues. Each year during the Medicare Part D open enrollment period, HAAA hosts many large outreach and enrollment "clinics" for individuals to meet with SHIIP volunteers regarding their Part D plans and other insurance related concerns. HAAA also applied for and was awarded one of the State's Medicare Improvement for Patients and Providers Act (MIPPA) grants which HAAA uses to provide outreach and enrollment to members of the community who are eligible for Low Income Subsidies (LIS) and Medicare Savings Programs (MSP). HAAA has also been a long time participant in the federal effort to reduce Medicare fraud and misuse through the Senior Medicare Patrol (SMP-formerly Operation Restore Trust). Through SMP, HAAA provides training to older adults on reading their statements and recognizing mistakes and potentially fraudulent activity. Lastly, in the ongoing effort to ensure that consumers in the service area have the information needed to make long term services and supports insurance decisions, Options Counselors with the Aging and Disability Resource Center (ADRC) and other HAAA staff are trained as SHIIP counselors.

Targeting Plan:

A great deal is already known about consumer needs, service gaps, and about the target population in the Planning and Service Area (PSA). It is known that:

- Iowa's population is getting older.
 - The Iowa Aging Demographics which is based on U.S. Census Data shows 16.4% of the population in the Planning and Service Area is over the age of 60 while 6.1% of the population is over the age of 75 (2005-2009 American Community Survey, Special Tabulation on Aging – Population Characteristics/ prepared by the U.S. Census Bureau, 2011).
 - Of the consumers that HAAA served who reported complete NAPIS data, 35% of were between the ages of 60-74 while 65% were over the age of 75.
- Many of the consumers accessing services through the Area Agency on Aging are of low income and/or living below the poverty level.
 - Nationally, 9% of older adults live at or below the poverty level. If cost-of living by region, non-cash benefits, and non-discretionary spending like out-of-pocket medical costs are taken into account, the percentage is closer to 16% (AOA, A Profile of Older Americans: 2011, web www.aoa.gov 10/10/12).
 - Thirty-three percent (33%) of the consumers reporting complete NAPIS data in this Planning and Service Area, had incomes consistent with federal poverty income guidelines.
- Consumers are accessing services later and often at the point of a health, financial, and/or legal crisis. Consumer's needs are more complicated requiring more expertise and flexible interventions.
 - From data gathered working on the Stanford Pilot project it was discovered that 91% of older adults have at least one chronic condition, and 73% have at least two.
 - Case Managers, Options Counselors and Elder Abuse Intervention staff report that the individuals being served at home seem to be frailer and more often have multiple chronic health and mental health conditions. Dysfunctional and dangerous family relationships, legal issues, inadequate dependent adult and lack of elder abuse laws, hoarding, mental illness, lack of appropriate substitute decision makers, and substance abuse are all common barriers to consumer independence and professionals working with them must be skilled at dealing with all of these areas.
 - Mental Health issues contribute to this need area. Older adults are the least likely of any age group to receive specialty mental health services. Older adults with untreated mental illness use more health services like emergency rooms and medical treatment outcomes for other conditions are worse when complicated by untreated mental health problems. Mental illnesses are the third most common health problem among older Iowans with 1 out of 5 older Iowans experiencing a mental health issue. Fifty percent (50%) of seniors with mental illness do not receive treatment (Iowa Coalition on Mental Health
- Many older adults and people with disabilities are relocating from rural Iowa to urban settings. This is true even within this Planning and Service Area. Five of the seven counties in this Planning and Service Area are defined as rural.
 - Recent studies indicate that less than 35% of those 60 years old or older in the HAAA region are living in a rural setting (2005-2009 American Community Survey, Special Tabulation on Aging – Population Characteristics/ prepared by the U.S. Census Bureau, 2011).
 - Per Wikipedia 61% of Iowa's population live in urban areas. Urban counties in Iowa grew by 8.5% between 2000 and 2008 and rural counties declined by 4.2%. This "rural flight" has caused population increases in all of Iowa's more urban counties including Linn and Johnson Counties, two of the seven counties comprising this Planning and Service Area.

- NAPIS data indicates that 52% of the consumers served by HAAA were living in the two urban counties (Linn and Johnson) while 48% were spread over the remaining five rural counties. More than half of the consumers served were in just two of the counties in the Planning and Service Area.
- Iowa is not a largely diverse state but the numbers of older adults and adults with disabilities who are of defined minority status and/or are Non-English speaking is growing.
 - 2010 Census Data shows that almost 4% of the population of Iowa is foreign-born and between 2000 and 2008 the Latino population in Iowa grew by 52%. The Pew Hispanic Center estimates that anywhere from 55,000 to 85,000 people living in Iowa are undocumented (2-3% of population).
 - According to the 2010 Census, anywhere from 1%-5% of the population in each of the seven counties in the Planning and Service Area speak Spanish as their primary language.
 - HAAA has served Latinos, Asians, Native Americans, and Africans through the Minority Outreach Coordinator position that was created as part of the Aging and Disability Resource Center and Options Counseling grants.
 - Only about 3% of the consumers served by HAAA and offering complete NAPIS information marked the NAPIS form indicating they are of a defined minority status. Most of that 3% indicated they are African-American. This is comparable to statewide statistics.
- The service needs and desires of older adults and adults with disabilities are changing.
 - HAAA notes a steady decline over the last ten years in the number of congregate meals served. Between 2002 and 2012 the number of congregate meals served decreased by more than 16%. The total number of meals did not decrease at the same rate so it is assumed that there was shift from taking meals at a congregate setting to taking meals at home. This shift substantiates the notion that consumers are frailer than ten years ago and dependent on home and community based services in their homes.
 - Surveys by the American Association of Retired Persons (AARP) found that more than 85% of Americans age 50 and older want to "stay in my own home and never move."
 - People want to live in their own homes but the service delivery system can be complicated and difficult to navigate. People need care coordination and help understanding their choices for long term services and supports.
- Caregivers are more valuable than ever to families and to the home and community based service network.
 - According to an AARP study, the economic value of family caregiving is estimated at \$350 billion nationally, and at \$3.5 billion in the state of Iowa (AARP Iowa website article: Survey Shows One-Third of Americans Play Caregiver Role, posted April 16, 2010).
 - More than 3% of the total number of consumers completing a NAPIS form reported being a family caregiver while just less than 1% reported being an older adult caring for a child.
- Dependent adult abuse and elder abuse is a growing problem. Current laws do not fully address the vast array of complicated problems related to the abuse, neglect, self-neglect, and exploitation of older adults and adults with disabilities.
 - In Fiscal Year 2012, over 500 referrals were received in the four counties currently served by the HAAA Elder Abuse Intervention program. There were 61 new ongoing cases added to the active client list. Nearly 500 hours were spent on active ongoing EAI cases.
 - One in ten older adults in America is a victim of abuse, neglect, and/or exploitation. One of two victims has dementia (Ageless Alliance – United Against Elder Abuse. www.agelessalliance.org).
 - For every case of elder abuse reported, twenty-three cases are NOT reported (Ageless Alliance – United Against Elder Abuse. www.agelessalliance.org).
 - Neglect (including self-neglect) and financial exploitation are the most common types of abuse (Ageless Alliance – United Against Elder Abuse. www.agelessalliance.org).

- Elder abuse can dramatically shorten the life of an older victim.
- HAAA diligently works to promote the dignity, healthy living and independence of older adults and persons with disabilities in order to remain in their own homes and communities. To realize this, HAAA must create, provide, and sustain innovative programs to maintain current clients and stakeholders while enticing creative organizations, baby boomers, younger caregivers, non-English speakers, and young adults with disabilities. However, several opportunities still remain uncharted and untested as viable means to target other populations.
 - Utilizing the data obtained and information gathered through current consumer needs, potential consumer need, target population needs, unmet needs and service gaps through NAPIS, U.S. Census data, existing data from partners, other state and national organizations, Client and Stakeholder Experience Surveys, program reports made available through new software, periodic needs assessments, focus groups, Task Force reporting and testimonials, and more; HAAA will utilize the expertise of the agency staff and the Resource Development Coordinator to build, enhance, and modify an agency marketing strategy and recruitment plan while building strong financial support with a diverse base of donors.
 - The successful marketing strategic plan must address the uniqueness of distinct populations and age groups while addressing the relative modernity of the aging and disability network. HAAA must pay special attention to the natural bias of the community that most programs are only for “aging” or “for people of financial need.” It must be clear, with measurable objectives and be able to gauge success or areas for enhancement. It will address the target populations and include key messages and strategies to reach specific identified target audiences. Lastly, it will include a cost-benefit analysis to determine scope and reach of messages and efficiencies/stewardship of allocated resources.

SECTION 5: STRATEGIES FOR SERVICE DELIVERY

HAAA will utilize a number of strategies for services delivery under the Area Plan that will include partnerships, internal and external service delivery, outreach to target populations, the prioritization of services, equal access to services, volunteers, economic and social resources and through the continued value of collaboration. The full implementation strategy for the delivery of services includes providing some services directly and others by working through partnerships and funding relationships within the regional Aging Network. HAAA currently funds approximately 25 agencies throughout the seven county region through a subcontractual relationships determined through the RFP process and contract monitoring described in detail in Section 6 of this Area Plan.

A summary of priority services and their delivery under this Area Plan will be:

Case Management - HAAA uses an internal/external model with the program centrally administered through HAAA with three main administrative staff, four “internal” case managers, and one large subcontractor serving approximately 850 clients in the Planning and Service Area. The subcontractor has been awarded two separate contracts, one for Elderly Waiver CMPFE and one for Non-Waiver CMPFE. While various agency staff contributes to the implementation of the program, there are essentially seven main CMPFE staff members employed by HAAA. The Care Connections Director supervises internal program staff, monitors the contracts for the program, provides training, gathers, analyzes, and reports data for the Quality Improvement Plan, monitors billing activities, and directs the daily operations. The Case Management Coordinator works directly with both internal and contracted case managers, carries out daily, monthly and individual documentation monitoring, troubleshoots program and case-specific issues, manages direct service funds, and coordinates the day-to-day activities of the program. A fiscal assistant performs billing for the program. The four case managers cover clients in counties where there is not a subcontractor and special populations in each of the seven counties in the Planning and Service Area.

Congregate Meals- HAAA 's strategy for implementation of the service of Congregate Meals is currently part of the HAAA Request for Proposal process described in Section 6. This service is currently available to participants in seven counties, in 31 different locations. Most locations serve meals Monday through Friday, while three sites are open seven days a week. Based upon a successful HAAA Request for Proposal completion and funding approval, HAAA will continue to subcontract Congregate Meals, and fund services based on a negotiated purchase of service rate.

Health Promotion - As a mandatory core service, HAAA believes that in order to maintain the strength and well-being of the clients, Health Promotion must be a key component to the services it offers. HAAA has consistently been on the cutting edge of Health Promotion activities. HAAA is a sought after partner with community agencies offering health screenings and assessments. HAAA utilizes meal sites and other congregate settings as avenues to offer seniors screenings and to host community education events that highlight ways to improve behavioral, mental, and physical health. Education is a key implementation strategy. The agency consistently provides awareness to the community about self-management of chronic conditions, including mental health and substance abuse. This is an integral part of health care and HAAA educates all consumers by generating and disseminating information about cost-effective strategies, benefits outreach, and enrollment activities. HAAA continues providing tools to manage conditions, through evidenced based wellness programs like the Chronic Disease Self-Management Program and Matter of Balance. HAAA encourages partner providers to be aware of the importance of client health by offering partners tools, resources and technical assistance to inform, educate and encourage prevention strategies to not only those 60 and older but to the caregivers and family members of the clients. HAAA encourages the offering of home assessments by some providers, which helps minimize falls in the home and has a past history of funding medication management tools. All of these strategies improve quality of life, while reducing health care costs.

Home Delivered Meals- HAAA's strategy for implementation of the service of Home Delivered Meals is currently part of the HAAA Request for Proposal process described above in congregate meals. HAAA offers traditional hot meals, frozen meals, breakfast bags, supper bags, and liquid supplements. Most providers offer Home Delivered Meals five days a week, while two providers offer meals on the weekend, on a limited basis.

Information and Assistance - HAAA's strategy for implementation of the service of Information and Assistance is comprehensive and serves as a "no wrong door" access point to the HAAA continuum of care. HAAA believes that this access is critical and must be available to individuals 24 hours a day, seven days a week. To meet this high of a standard and fully implement this strategy, HAAA's activities include internal and external access points. All appropriate efforts are made to provide Information and Assistance callers/visitors in the HAAA region with current information on opportunities and services available based on the consumer's need and to ensure the consumer is assisted in a timely manner with the most helpful, up to date information available. Assistance in gaining access to such supportive services offered by HAAA can be obtained by calling HAAA at 319-398-5559 or 1-800-332-5934. In person office appointments are also available. They can also email HAAA at heritage@kirkwood.edu.

The external access points that are also part of HAAA's strategy include a formal partnership with FCFH-Iowa, Inc. (First Call for Help Iowa, Inc.) United Way 2-1-1. Information and Assistance services are also currently part of the HAAA Request for Proposal process described above. Any and all providers of Information and Assistance services are welcomed to complete the HAAA Request for Proposal. Currently, HAAA partners with FCFH-Iowa, Inc. (First Call for Help Iowa, Inc.) United Way 2-1-1 in a variety of ways, including referral, after business hours/holiday intake, database collaboration, emergency response and preparations.

The Elder Abuse Intervention (EAI) program also provides for a portion of Information and Assistance services through HAAA. Individuals calling the agency may have a need that directly relates to the expertise of the Regional Protective Services Coordinator (RPSC). Calls may come through the standard Information and Assistance line or they may come

directly to the RPSC for help. The RPSC will follow the same customer service standards as the HAAA Resources and Caregiver Support Program Coordinator. All EAI related contacts that occur prior to admission will be counted as an Information and Assistance service.

Case Manager's for the Case Management Program for Frail Elderly (CMFPE) often have contacts that occur with consumers prior to the consumer's admission to the program. The admission date for CMFPE is the initiation date of the initial assessment. Several contacts must occur prior to the completion of the assessment such as the initial referral, activity related to determining eligibility for Elderly Waiver, and the call to schedule the appointment. All of these are valid and necessary contacts and need to be documented and captured as part of the consumer's "preadmission" activity. HAAA will count these "preadmission" contacts as Information and Assistance contacts.

Legal Assistance- HAAA's strategy for implementation of the service of Legal Assistance is currently part of the HAAA Request for Proposal process described in Section 6. HAAA works very closely with a local attorney with expertise in elder law and more than 35 years of experience. This service is available to all seven counties and home visits are available. The rate currently reimbursed to this attorney is far below the market rate allowing HAAA to maximize resources and work in partnership with the established priority areas set by the Iowa Department on Aging. HAAA has also actively participated in meetings with the Iowa Department on Aging, Iowa Legal Aide and other Area Agencies on Aging to review the current model of delivery of legal services and will continue to do so.

Nutrition Counseling- HAAA's strategy of implementation of the service of Nutrition Counseling is currently part of the HAAA Request for Proposal process described above. HAAA's strategy for Nutrition Counseling includes reevaluation of the current service delivery method and reaching out to a more diverse group of providers of Nutrition Counseling. HAAA intends to pursue contracting with local dieticians to encourage more client engagement in the Nutrition Counseling program and to expand this service region wide.

Nutrition Education- HAAA's strategy of implementation of the service of Nutrition Education is currently administered in conjunction with the service of Congregate and Home Delivered Meals. HAAA produces a healthy living newsletter several times per year and researches specific nutrition-related topics for each month. This information is distributed to each Home Delivered Meal participant upon meal delivery. The delivery drivers discuss key topics of the healthy living newsletter with participants to ensure the participants' understanding of the materials presented and to answer any questions they may have. The healthy living newsletter is also distributed to each congregate participant and the site managers present specific topics of interest from the resources provided by HAAA.

Adult Day Care/Adult Day Health - HAAA's strategy for implementation of the service of Adult Day Care/Adult Day Health is currently part of the HAAA Request for Proposal process described in Section 6. Today, there are four Adult Day Health Centers in three of the counties served by HAAA. However, based on funding requests, such services are open to all older adults in our region provided they have transportation.

Assessment and Intervention- The Elder Abuse Intervention (EAI) Program has been a successful program of HAAA for ten years. HAAA will continue the program but will make some changes to enhance the program and also to ensure the program carries out the intentions of the Assessment and Intervention taxonomy. Currently, HAAA's EAI program serves only some of the counties in the Planning and Service Area and operates on a partially internal and partially external model. The Regional Protective Services Coordinator is employed by HAAA and monitors the contracts for the program, provides training and outreach, acts as a central point of intake for referrals, works directly with clients, and manages the day-to-day activities of the program. Another HAAA staff member is allotted a quarter of her time to cover clients and cases in two of the rural counties in the Planning and Service Area. Direct service staff of this program are called "Protective Services Specialists" (PSS). Although the EAI program has a similar mission, some shared staff, and frequent contact with case managers through the Case Management Program for Frail Elderly (CMFPE), PSS do not case

management the same clients to whom they are providing EAI services. This separation was implemented in an attempt to reduce reporting and funding conflicts that arise when a single person may be simultaneously providing two different services.

Assisted Transportation & Transportation - HAAA's strategy for implementation of the service of Assisted Transportation is currently part of the HAAA Request for Proposal process described in Section 6. HAAA reimburses mileage to subcontractors providing this service. Comments also made during the public hearing process reflect the need for rural transportation.

Chore - HAAA's strategy for implementation of the service of Chore is currently part of the HAAA Request for Proposal process described in Section 6. HAAA has established purchase of service rates with each individual provider.

Evidence-Based Health Promotion - HAAA has strong, well known, Evidenced Based Health Promotion programs. Two nationally recognized programs are offered through HAAA, Chronic Disease Self-Management Program (CDSMP) and Matter of Balance (MOB).

Homemaker- HAAA's strategy for implementation of Homemaker services is to continue to use designated direct service dollars that are accessed via HAAA's Care Connections Team. Members of the Care Connections Team include Case Managers, Aging and Disability Resource Center Options Counselors and the Resources and Caregiver Support Program Coordinator. Homemaker direct service dollars have proven to be vital to the independence of clients in the HAAA region. The need for Homemaker services have been consistently increasing over the last few years. HAAA's strategy for implementation is to continue the partnerships with local providers in the community that have been serving HAAA's clients in this capacity for the last several years.

Legal Education - HAAA's strategy for implementation of the service of Legal Education is currently part of the HAAA Request for Proposal process described in Section 6 and provided through the current Legal Services provider. The strategic service implementation plan is to continue to offer Legal Education by an attorney in a variety of settings.

Material Aid- HAAA's strategy for implementation of the service of Material Aid is to continue to use direct service dollars that are designated for use by the Care Connections Team. Members of the Care Connections Team include Case Managers, Aging and Disability Resource Center Options Counselors and the Resources and Caregiver Support Program Coordinator. Material Aid direct service dollars have proven to be critical to the independence of clients in the HAAA region. HAAA's strategy for implementation is to continue the partnerships with local providers in the community that have been serving HAAA's clients in this capacity for the last several years. This service and any resources directed to Material Aid will enhance and compliment the vast array of home and community based services that HAAA offers.

Mental Health Outreach- HAAA's strategy for implementation of the service of Mental Health Outreach is to continue to solicit a Request for Proposal per the HAAA Request for Proposal process described in Section 6. Mental Health Outreach is currently provided through one provider serving three counties.

Money Management- HAAA's strategy for implementation of the service of Money Management is to continue to use direct service dollars that are designated for use by the Care Connections Team. Members of the Care Connections Team include Case Managers, Aging and Disability Resource Center Options Counselors and the Resources and Caregiver Support Program Coordinator. In regards to the Money Management program, direct service dollars are utilized for fees associated with Conservatorships since there aren't many people out there that will act as Conservators. HAAA's strategy for implementation is to continue the partnership with the few local individuals that have been serving HAAA's clients in this capacity for the last several years. This service and any resources directed to it will supplement HAAA's CDBG Money Management program and the AARP Money Management Program to make the assistance with finances through volunteers.

Options Counseling- Options Counseling (OC) is a key access service to HAAA. HAAA's Aging and Disability Resource Center (ADRC) utilizes several trained Options Counselors internally and through an external partner.

Outreach- Capacity building is a critical component to HAAA's plan to support and build a coordinated system of home and community based services for the growing population of seniors in our area. The Resource Development Coordinator will serve as liaison between other funding organizations including, but not limited to, the United Way of East Central Iowa, the United Way of Johnson County, Greater Cedar Rapids Community Foundation and county and city leaders and look for ways to leverage funding to maximize and grow service delivery. In addition, this individual will work cooperatively with area providers to identify local, regional, state, and national grants that provide the opportunity to build the service delivery system. Outreach activities will be supported by Kirkwood Community College via its media department and a production of a monthly television program. The program will serve as a public service to elevate the awareness of older adults, people with disabilities, their caregivers, and the general public about services and supports, critical social and policy issues, service delivery gaps, and emerging needs. In addition, a robust social media platform will be implemented to reach out to caregivers, volunteers, and advocates to educate constituencies about services, upcoming events, and volunteer opportunities.

HAAA diligently works to promote the dignity, healthy living and independence of older adults and persons with disabilities in order to remain in their own homes and communities. To realize this, HAAA must create, provide, and sustain innovative programs to maintain current clients and stakeholders while enticing creative organizations, baby boomers, younger caregivers, non-English speakers, and young adults with disabilities. After more than forty years, many of the programs established by HAAA continue to enable older and disabled adults to remain in their homes and communities while living life fully. However, several opportunities still remain uncharted and untested as viable means to target other populations.

Utilizing the data obtained and information gathered through current consumer needs, potential consumer need, target population needs, unmet needs and service gaps through NAPIS, U.S. Census data, existing data from partners, other state and national organizations, Client and Stakeholder Experience Surveys, program reports made available through new software, periodic needs assessments, focus groups, Task Force reporting and testimonials, and more; HAAA will utilize the expertise of the Resource Development Coordinator to build, enhance, and modify an agency marketing strategy and recruitment plan while building strong financial support with a diverse base of donors.

The successful outreach plan must address the uniqueness of distinct populations and age groups while addressing the relative modernity of the aging and disability network. HAAA must pay special attention to the natural bias of the community that most programs are only for "aging" or "for people of financial need." It must be clear, with measurable objectives and be able to gauge success or areas for enhancement. It will address the target populations and include key messages and strategies to reach specific identified target audiences. Lastly, it will include a cost-benefit analysis to determine scope and reach of messages and efficiencies/stewardship of allocated resources.

Public Information – HAAA's strategy for implementation of the service of Public Information will be the continuation of our national and state award winning monthly television program; *The Involvement Report*. A partnership between HAAA, Kirkwood Community College Media Services, and Kirkwood Television, *The Involvement Report* brings information on a wide variety of issues related to aging and disability to its viewers.

Respite - HAAA's strategy for implementation of the service of Respite is currently part of the HAAA Request for Proposal process described in Section 6. HAAA has established purchase of service rates with each individual provider.

Training/Education - HAAA's strategy for implementation of the service of Training/Education is expansive throughout the HAAA region and is provided by numerous HAAA staff. Training/Education opportunities provided by HAAA currently

includes and will continue as part of the future strategy to consist of caregiver education, Caregiver Wellness Day, formal presentations to the public on positive aging, health promotion, education and wellness, how to access long term services and supports, available benefits through Medicare and Medicaid. Training/Education is provided informally as well through presenting knowledge and skills training via web-based instruction and caregiver support groups. This includes educating providers about needs, trends and consumer unmet needs.

HAAA on Aging's Care Connection Director has provided Training and Education to the Case Management for Frail Elderly (CMPFE) team through monthly Regional Case Management Team Meetings for six years. HAAA will continue providing this service in the monthly meeting format. Case Managers are trained on a variety of topics including program policies and procedures, Iowa Administrative Rules, program developments and trends, and more. If topics extend beyond the CMPFE team, staff from the Aging and Disability Resource Center, Elder Abuse Intervention program, and Information and Assistance and Caregiver Support programs are also invited to attend.

HAAA staff members will continue to represent the agency when invited to speak to college classes, civic groups, provider groups, and more. Topics will include general agency information, disease specific information, elder abuse, Medicaid, Medicare, available long term services and supports, nutrition, caregiver information, and more.

The Case Management Coordinator will continue to host a monthly informational session allowing local providers of services to sit down with Case Managers and staff from the Aging and Disability Resource Center, Elder Abuse Intervention program, and Information and Assistance and Caregiver Support programs. The provider is given the opportunity to meet the people with whom they might share clients and to educate them on their products and services.

Case Managers and other HAAA staff will continue offer Training and Education to students from nearby colleges and universities. HAAA will host practicum students from Kirkwood Community College, The University of Iowa, Mount Mercy University, The University of Northern Iowa, and other nearby schools. HAAA partners with Kirkwood Community College as a clinical rotation sight for nursing students in the "Community Nursing" portion of their rotation. Nursing students shadow a Case Manager for two days. One day the student shadows a Case Manager working in rural county and the other day they shadow a Case Manager working in a more urban setting. Additionally, HAAA offers several practicum placements for Social Work and Human Services students.

HAAA will continue with the current implementation strategy as it has proven to be well received and quite successful.

Family Caregiver Services

Access Assistance- HAAA's strategy for implementation of the service of Family Caregiver Access Assistance is comprehensive and serves as a "no wrong door" access point to the HAAA continuum of care. All appropriate efforts are made to provide Family Caregiver Access Assistance callers/visitors in the HAAA region with current information on opportunities and services available based on the consumer's need and to ensure the consumer is assisted in a timely manner with the most helpful, up to date information available. Assistance in gaining access to such supportive services offered by HAAA can be obtained by calling HAAA at 319-398-5559 or 1-800-332-5934. Additionally, an Information and Assistance helpline is available by calling toll-free, nationwide at 1-866-432-4324. In person office appointments are also available. They can also email HAAA at heritage@kirkwood.edu.

Counseling- HAAA's strategy for implementation of the service of Counseling includes expansion and better reporting from HAAA based upon pending rule changes. HAAA offers and will expand emotional support for caregivers in a variety of means. HAAA staff, typically the Resources and Caregiver Support Program Coordinator, provides information, educational materials and guidance to caregivers to assist them in making decisions and problem solving. HAAA will also begin holding support sessions for caregivers in addition to educational sessions and the Caregiver Wellness Day, such as

a "Facebook Friday" session for caregivers on Facebook. This is an opportunity for a new demographic of family caregivers to have a real time, interactive, one-on-one, social media sessions with a trained HAAA staff person to answer questions and to provide a new kind of emotional support and online community. The reach of this program session is limitless. Additionally, HAAA is in the process of establishing a support group directed towards working caregivers to take place on a monthly basis with the possibility of increasing frequency as warranted.

Information Services - HAAA's strategy for implementation of the service described as Information Services will be coordinated through caregiver support and education opportunities. These programs have traditionally addressed the need for quality Information Services on available resources and supports to individuals who provide care of older adults, both professional and family caregivers. HAAA will offer approximately twelve Caregiver Educational Sessions a year. These presentations will cover many topics specific to the needs of family caregivers, such as legal issues, stress reduction techniques, available resources and much more. Also, HAAA will continue to hold an annual Caregiver Wellness Day that is a wonderful event for family caregivers offering information, national speakers and respite care. HAAA's strategy also includes increased articles and informational pieces on HAAA's online publication, *The Involvement Magazine*, and more education distributed through social media, such as Facebook postings of articles or links as general information and not counseling.

Respite - HAAA's strategy for implementation of the service of Respite is currently part of the HAAA Request for Proposal process described in Section 6. HAAA has established purchase of service rates with each individual provider.

Cash and Counseling- HAAA's strategy for implementation of the service of case and counseling through supplemental services is to empower the HAAA Resources and Caregiver Support Program Coordinator to offer such services to family caregivers identified as caring for a particularly high risk older adult(s), experiencing an extreme level of caregiver stress, or other circumstance that would put the care recipient at undue risk for premature institutionalization. Services would be funded by HAAA and in accordance with an annual budget. This would be done in conjunction with the other programs within the HAAA care continuum and in compliance with all applicable rules and regulations.

HAAA's strategy and implementation plan to ensure that older individuals throughout the Planning and Service Area receive equal access to services, regardless of their location is to take steps to ensure the following:

- HAAA will effectively coordinate programs and activities related to the purpose of the Older Americans Act
- HAAA and funded service providers shall provide coordination and outreach efforts, including direct services and public education
- HAAA shall develop and designate, where feasible, a focal point for comprehensive service delivery in each community
- HAAA will encourage collocation of services at focal points when possible
- HAAA will provide services to person who speak languages other than English as well as those with hearing and visual impairments

HAAA effectively coordinates programs and activities that provide an equal access of services through a variety of HAAA programs that are available in all seven counties. HAAA will continue to facilitate the area wide development and implementation of a comprehensive coordinated system for providing long term care in home and community based settings in a manner responsible to the needs and preferences of older individuals residing in rural areas; older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas); older individuals with greatest social need (with particular attention to low income minority individuals and older individuals residing in rural areas); older individuals with severe disabilities; older individuals with limited English proficiency; older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and older individuals at risk for institutional placement.

Access to services shall be consumer driven for all people/all payers, diverse and “no wrong door” as previously described. Points of access can be obtained at HAAA, with our partners in Aging Network, and through our volunteer structure.

HAAA has County Task Forces in each of the seven counties. Task Force members are volunteer advocates for the target population, representatives from local organizations and governments and members of the general public. The individuals on the Task Force serve as informal local “access points” to and for HAAA. These dedicated individuals work strategically with HAAA and within the community by monitoring, evaluating and commenting upon all policies, programs, and community actions that impact older adults as described in the Older Americans Act. HAAA has more than 140 volunteers serving on County Task Forces and all receive training and information on HAAA and the aging and disability networks to serve their communities and help HAAA address the agency’s mission.

HAAA staff and volunteers serve on a wide range of community boards and committees. These resources are allocated for the purpose of coordinating agency efforts with those of other organizations and reducing any duplication of services while increasing the number of access and focal points to services.

Traditionally, HAAA has considered local dining sites as a formal focal point for comprehensive service delivery in each community while giving special consideration to designating multipurpose senior centers as community focal points on aging. HAAA still considers dining sites an excellent access point to services because information available at these locations and subcontractors and their staff are required to know where additional services may be obtained and know who works in areas of abuse, exploitation, and neglect of older adults. However, HAAA recognizes that this type of focal point designation is evolving and must be considered as services and the funding available in a community develops.

HAAA is expanding regional access and focal points to be a more diverse group of partners, including members of the disability community, ADRC staff, case managers and prevention specialists to ensure that all of the Planning and Service Area has equal access regardless of location.

HAAA’s will continue to actively plan, evaluate methods and strategize to provide equal access and consistent service to older individuals throughout the Planning and Service Area.

HAAA has discussed a number of economic and social resources. In addition to previous mentions, it is important to point out the support of Kirkwood Community College. Historically, Kirkwood has provided space, utilities, and bookkeeping services “in-kind” as part of its service to the community. HAAA may also access other college services, such as meeting rooms, media and telecommunications services, maintenance, security, printing, purchasing, etc.

HAAA has a cooperative relationship with the Kirkwood Foundation, an entity separate from the college itself. HAAA’s Older Iowans Fund Endowment is part of and managed by the Kirkwood Foundation. The endowment seeks to provide long term sustainability for critical home and community based services for older adults in the seven county region served by HAAA.

HAAA benefits from the name recognition and fine reputation of Kirkwood. Kirkwood benefits from the involvement of older adults and people with disabilities in college activities and their support of the college because of their relationship with HAAA. Over the years, the relationship between HAAA and Kirkwood Community College has been one of mutual respect, support and trust. It speaks to the quality of leadership and integrity present at both the HAAA and Kirkwood levels.

Value of Collaboration

HAAA serves as a model of collaboration and partnership. HAAA has been dedicated to such a model of services delivery since the beginning and has no intention of changing this incredibly effective and efficient strategy. Many of our partnerships have been discussed at length in this Area Plan, but some equally important that have not yet been mentioned are:

- *Mercy Medical Center* – Mercy partners with HAAA to sustain the CDSMP. HAAA brought this program to the region in 2006 through a previous grant opportunity but has been able to reach a much larger audience through the partnership with Mercy. HAAA continues to build momentum at the federal level by leveraging pilot programs through Stanford University and being the only AAA in the state to house a national T-Trainer. Mercy sustains the program financially as well as through program development.
- *Meals on Wheels Association of America* - HAAA and the national Meals on Wheels Association of America have enjoyed a strong collaborative partnership for over five years. This partnership extends far past the payment of membership dues. HAAA has collaborated with MOWAA on the regional Hunger Forum in 2010, the HAAA Nutrition and Healthy Living Coordinator was named one of twelve national Young Leaders in 2009, has been asked to assist other senior nutrition providers who have been affected by disasters, to provide technical assistance in recovering from disasters, and most notably, HAAA and MOWAA have partnered together, along with Rutgers University of New Jersey and the United States Department of Agriculture, to study food safety and emergency food preparedness in the homes of those that receive home delivered meals. Through this partnership, HAAA has been able to enhance and enhance its nutrition services to older adults throughout its region, while concentrating on those that are the most at-risk for food insecurity and institutional placement. HAAA has also been the recipient of several educational grants that have allowed the HAAA Nutrition and Healthy Living Program Coordinator, attend the MOWAA Annual Conference, in addition to attending an intensive financial management workshop. They also have created additional opportunities for funding sources and future enhancements that could be made to the current Senior Nutrition Program.
- *Senior Health Insurance Information Program (SHIIP)* - provides assistance with access in public and private benefits. Medicare, Medicaid, private and other public programs can be confusing to the average community member; SHIIP volunteer counselors are there to provide one-on-one assistance. Counselors can assist in comparing supplemental insurances, drug coverage plans, understanding policies, and applying for assistance. SHIIP provides us with all SHIIP training on updates to Medicare and also provides us with all supplies we need to support the program; like supplemental guides, brochures, updates to our manuals, any supplies we need to use at health fairs like; table cloths, giveaways, informative information along with backdrops and the also provide us with a free online program to document all clients we see. They also help us when the counselors are unable to locate information on a client; they are a phone call away for us to get the assistance we need. They also provide us with a reimbursement of \$3 for every client we see in the calendar year to help with costs like, room rental, computer usage, printer ink and printer paper. They also provide HAAA with a laptop computer and printer for the SHIIP counselors to use at the Free Clinic here in Cedar Rapids to assist with Medicare needs. The partnership we have with SHIIP, is very beneficial for us because of the access they have to the paperwork and training that is invaluable to the counselors to make sure that we are getting and giving the most current information available to the clients we are seeing. Original MOU was signed 7/11/1990.
- *Other area funders* – HAAA has active collaborations with other area funders such as United Way, Greater Cedar Rapids Community Foundation, area Board of Supervisors, and others. HAAA staff regularly meet with representatives of these organizations to work to address common goals which include increasing access to services, identifying needs, avoiding the duplication of services and/or funding of services, strategic initiative development and resource utilization.
- *Iowa COMPASS* – The HAAA ADRC is engaging in a new partnership this Fiscal Year. The HAAA ADRC will partner with Iowa COMPASS to strengthen the disability services available through its ADRC. Iowa COMPASS is a leading and

trusted source of information on disability services and assistive technology. The outcomes of this partnership will be increased knowledge for the ADRC staff about disability programs and services and an increase in the number of callers who are referred from Iowa COMASS to the HAAA ADRC for Options Counseling. Both of these outcomes will increase consumer access to long term services and supports. This partnership will include the co-location of a HAAA ADRC Options Counselor at the Iowa COMPASS offices.

- o *ADRC Linn County* – Previous to grants becoming available to Area Agencies on Aging, ADRC of Linn County, had already launched an ADRC program through other state funding. Linn County allowed HAAA to build upon existing frameworks and systems which maximized the grant resources even further and avoided duplication of services. HAAA's partnership with Linn County has garnered financials and supportive resources allowing the ADRC to sustain beyond the original grant allocation. Administrative and other program costs are shared between the two partners. Also, Linn County staff chair the Regional ADRC Advisory Committee. This relationship has made it possible for HAAA to meet the needs of consumers on a larger scale.

ADRC Engagement

HAAA has been an Aging and Disability Resource Center (ADRC) since 2009/2010 when the first grants were awarded to Area Agencies on Aging in Iowa. In the past three years, HAAA has taken the ADRC from a two county pilot site to a regional service provider that is recognized as the gateway to long term services and supports for all people and all payers. HAAA ADRC has a solid reputation of partnership recruitment, building, and nurturing beginning with the first partnership developed at the inception of the grant.

HAAA was provided a unique opportunity through an Options Counseling Grant to bring Options Counseling to minority and non-English speaking individuals throughout the Planning and Service Area. HAAA hired a Minority Outreach Coordinator and charged this individual with improving access to services for this population and with increasing awareness of different cultures' aging and disability needs. The Minority Outreach Coordinator worked to build partnerships with community organizations and individual members of this population. Some examples of partnerships that this position has brought to the agency include Immigrant Concerns group through the Catherine McAuley Center, senate and house representatives, the Bureau for African Families, Justice for Our Neighbors, the Hispanic Pastoral Minister of the Immaculate Conception Church that has a large Spanish-speaking community, local free clinics, local homeless shelters to assist with bilingual residents, school districts to reach out to bilingual families that may include older adult or adults with disabilities, neighborhood centers, and Monsoon, an agency that reaches out to the Asian and Asia Pacific Islanders regarding sexual assault.

HAAA ADRC will engage in a new partnership this Fiscal Year. The HAAA ADRC will partner with Iowa COMPASS to strengthen the disability services available through its ADRC. This partnership will include the co-location of a HAAA ADRC Options Counselor at the Iowa COMPASS offices.

HAAA is excited about current efforts to bring new partners to the ADRC table. The Balancing Incentive Payment Program (BIPP), One Click/One Call project, Lifespan Respite, and the redesign of Iowa's mental health system can only allow increased awareness of the ADRC as well as further provide linkages to clients and partners. HAAA values strengthening relationships with Accountable Care Organizations, the Department of Human Services and the VA Medical Center in Iowa City. HAAA continues to work closely with Iowa Department on Aging in continued ADRC development. HAAA looks toward future growth activities to develop and implement a model for delivering the Veteran Directed-Home and Community Based Services (VD-HCBS) program in the HAAA ADRC service area. The model will be used in the expansion of the VD-HCBS into additional ADRC service areas.

At the State level HAAA will continue to advocate for sharing of information that allows for streamlined access to services in determining when people are enrolled into Medicaid waivers, individuals that enrolled into other public long term support services, and those enrolled into Medicaid residing in institutions. This is crucial to creating a seamless system and ease of communication for those navigating the system of long term care services and supports.

HAAA will continue to offer input into establishing a fee for the services of the Options Counselor and the continued development of state and federal Options Counseling Standards, as well as development of standardized forms, process and client action plans including client values, needs and preferences as well as, establishing forms and processes and Options Counseling Standards on a state and federal level.

As a lesson learned, ADRC's must address the issue of fee-for-service prior to offering the service of Options Counseling. It becomes a branding issue to a program that has begun to have name recognition. HAAA fully supports establishing a fee and encourages ADRC's to establish this first.

HAAA continues to seek out additional supporters to meet the ever increasing wave of older adults, adults with disabilities and their caregivers. HAAA ADRC will seek to improve its partner base through the efforts of the ongoing marketing and strategic planning to expand services to assist consumers through the ADRC network.

Section 6. Subcontractor Oversight and Monitoring

With more than 40 years of experience, HAAA is the leader in planning, coordinating, and funding programs that serve the 78,798 (2010 US Census) older adults in Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties. The full implementation strategy for the delivery of services includes providing some services directly and others by working through partnerships and funding relationships within the regional Aging Network.

Formal and informal partners are identified through public notices of release of Request for Proposals (RFPs), existing community collaborations and through the volunteer leadership at the Task Force and Advisory Council levels. HAAA awards funding contracts through the RFP process. Biannually, HAAA requests funding applications from local service providers for services to persons age 60 and older in the HAAA service area with an annual update. The announcement for release of these applications, RFPs, is done through a public notice to area newspapers and posted to the HAAA website.

Contracts awarded are generally purchase of service (POS) contracts with a negotiated rate determined through the RFP process and contract issuance unless that type of contract would have a negative impact on the provision of service or of disadvantage to HAAA or the partner. In that case, a grant contract with a monthly payment based on submission of required performance reports would be utilized. For example, a Respite provider would be awarded a contract at a POS rate of \$12.00 per unit (hour) while a Case Management provider would be awarded a grant based upon a case load range of a funded staff position to perform the program activity. The difference of funding or reimbursement type is further explained and dictated to partners in the HAAA Main Contract and discussed in detail in contract negotiation and at the annual mandatory subcontractor meeting held prior to the beginning of the contract period.

The RFP is used by HAAA to demonstrate an open and transparent application process and to provide a range of options to volunteer leadership. The contracts are awarded to responsible bidders whose proposals are determined to be most advantageous to the HAAA program vision and cost effectiveness. All contract awards and reimbursement is subject to the availability of funds. Applications are first reviewed for accuracy and scored by a review team which may include staff and a designee from Kirkwood Community College. The Planning, Program and Budget committee of the HAAA Advisory Council review the Applications and make recommendations to the HAAA Advisory Council. Upon approval of

the HAAA Advisory Council, Kirkwood Community College Board of Trustees or their Designee review with the HAAA Executive Director. Final judgment in determination rests within the legal relationship and structure of HAAA/Kirkwood Community College organizational oversight and departmental agreement.

Proposals are scored by the review team through a point system. Reviewers will assign points to each section based on the quality of the answer. Total points available are 100 based on the following scoring framework. Responsiveness to this Request for Proposal: this includes, but is not limited to, full completion of narrative, required attachments, and accuracy of requested information, both in terms of quantity and quality of information (30 points); Nature and extent of the Applicant's previous experience and demonstrated expertise in the service seeking funding for or a related service (25 points); Cost Effectiveness (25 points); Extent of Applicant's apparent understanding of the proposed program and the public service provided through its implementation (10 points); Extent to which the Applicant proposes to assist HAAA in achieving the vision for the proposed program and implement services as prescribed under the Older Americans Act and its amendments (10 points).

All HAAA funded programs have an assigned contract monitor. The contract monitor is responsible for the program assessment, monitoring of contract terms, and technical assistance for the funded program and subcontractor compliance and performance. This includes written monitoring reports at least quarterly to volunteer leadership and an on-site assessment report at least annually.

The on-site assessment or "contract visit" includes the completion of a monitoring tool. The staff participating in the contract visit typically includes the HAAA Fiscal Director, Operations Director and the contract monitor. Contract visits are rarely conducted with only one staff person to ensure proper oversight, while providing staff with areas of expertise and allowing for immediate technical assistance and/or response. This visit also provides additional opportunity outside of regular contract monitoring to evaluate the subcontractors' compliance with all applicable local, state, and federal laws and the assurance that funds are used in compliance with federal guidelines.

HAAA works to ensure that other available funding streams are utilized before Older Americans Act funds through a variety of means, this is part of the RFP process and closely monitored if a contract is awarded. HAAA asks potential subcontractors in the RFP about the prioritization process they propose and for an explanation of their ability to monitor and draw down funds of any potential contract with HAAA. If a contract is awarded, related issues are addressed through contract negotiation, contractual language, discussed at the contract monitoring visit, and reviewed through monthly and quarterly reports received and processed by the contract monitor. Practices of the subcontractors are also demonstrated through the required format of monthly and quarterly reports subcontractors must submit for payment.

HAAA contract monitors do conduct client satisfaction surveys annually on subcontracted programs as long as the collection of such information or making such contact would not put the client at undue harm or risk. HAAA uses the information gathered to identify any unknown issues and addresses those immediately with the funded agency. All surveys are summarized and discussed as part of the contract monitoring visit. In most cases, the survey is drafted and administered by HAAA.

HAAA dedicates a great deal of resources to ensuring the strength of the aging network in our region, including our partner providers. This can be a challenge at times with staff capacity, but the dedicated staff at HAAA works to address the issues to serve our mission and the individuals we reach directly and through partnerships.

HAAA has received guidance from Iowa Department on Aging this last year regarding our RFP process to ensure that we continue our due diligence and stewardship in the distribution of funding when making difficult decisions regarding

critical services. At the writing of this Area Plan, HAAA is currently in final contract negotiations for the Fiscal Year 2014 – 2015 contract cycle. HAAA made a number of changes in the most recent RFP cycle process based upon guidance given on the competitive bid process with the intent of providing an opportunity for a more diverse group of applicants and additional options to consider, as well as demonstrate that we are responsible with limited Older Americans Act dollars to provide quality services in a cost effective manner. Some of these changes included:

- Developed a more structured scoring sheet utilizing best practices from other Area Agencies on Aging
- Released the RFP earlier giving potential applicants more time to consider and complete
- Held a bidders conference that provided greater detail than in past trainings offered
- Posted all questions and answers on the HAAA website for more access to information by applicants and increasing transparency
- RFP materials included official language on the Advisory Council's vision for programs

HAAA is also currently working with an attorney to conduct a comprehensive review of our standard contract to confirm that all language is up to date with state and federal standards, including but not limited to procurement guidelines.

Section 7. Sustainability

The recent RFA process and the upcoming 2014-2015 planning cycle has given our organization the unique opportunity to re-evaluate and create a system that is sustainable and an improvement to the already high functioning, quality service delivery mechanisms that are available in the HAAA region. The possibilities for the region after July 1, 2013 are only to improve, grow in service and reach, and modernize to further improve the Aging Network, fulfill the objectives of the Older Americans Act, the service delivery mission of Kirkwood Community College, and work to ensure older adults and people with disabilities have the opportunity to live and thrive in a community setting of their choice.

HAAA has a history of participating in projects addressing trends in aging and disability related work. Many of these initiatives have become models of best practices state-wide or have become part of the core services offered by all Area Agencies on Aging. Most of these have been sustained for many years and have survived through funding struggles and shifts in trends and paradigms through the responsible and flexible strategies of sustainability practiced by HAAA.

The current sustainability strategy of HAAA includes such efforts as:

- The hiring of a Resource Development Coordinator that will be key to the goals of the development of a fee-for - service structure, diversifying funding streams, and to lead in acquiring gifts related to the Older lowans Fund endowment.
- Close monitoring of all contracts and approved budgets internally and externally to ensure fiscal responsibility and agency accountability to ensure funding throughout the Fiscal Year.
- Funding diversification goals related to the seeking of grants and opportunities for fundraising to financially support critical service gaps and that complement our mission and vision of the agency.
- The identification and provision of services to individuals eligible for assistance, with special emphasis on older individuals residing in rural areas; older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas); older individuals with greatest social need (with particular attention to low income minority individuals and older individuals residing in rural areas); older individuals with severe disabilities; older individuals with limited English proficiency; older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and older individuals at risk for institutional placement is comprehensive and coordinated, both internally and externally with our partner providers.
- Collaboration and partnerships that are active at a local and regional level
- Expanding our reach and efficiency by further developing regional access and focal points to be a more diverse group of partners, including members of the disability community, ADRC staff, case managers and prevention specialists to

reach the target population while improving equal access to services regardless of location in the region and addressing the represented needs.

- Collecting and analyzing data to be applied to the necessary decisions in the service delivery process
- Modernizing and ensuring cost efficiencies in all programs
- Improving technology and modernizing communication tools

While HAAA has proven through past performance and through the RFA process and proposal the ability to sustain priority and core services, there are tremendous opportunities for service improvement and expansion if additional funds were available. The HAAA sustainability strategy has allowed for many programs and services to be available in our region through all kinds of economic environments. However, there are great challenges and barriers that limit our ability to do all that we would like to do in the 2014-2015 planning cycle. HAAA would welcome the possibility of expanding program capacity and access through the creation of new positions within the agency as described in the RFA. Additional staff would allow HAAA to facilitate the comprehensive expansion of such critical services such as Elder Abuse Intervention services and improve the equity of access of services through a coordinated approach. But, the focus for the 2014-2015 planning cycle is on key initiatives stated throughout this Area Plan and staying true to agency values, goals and mission.

HAAA will continue to actively plan, evaluate methods and strategize to provide equal access, consistent service, and outreach to target populations throughout the region. We will do this while ensuring sustainability in core mandatory services through efforts described above but also without limiting our advocacy to speak out for additional services and financial support for initiatives that would have a positive impact on the people we serve.

AREA PLAN BUDGET REQUEST

Fiscal Year:2014, AAA:10: Heritage, Reporting Period:Budget, Report Version:2

Heritage Area Agency on Aging
 6301 Kirkwood Blvd., SW
 Cedar Rapids, IA 52406

	Prior Yr Resources	Current Yr Resources	Total Resources	Total Expenditure:	Balance
Resources - IDEA					
100: AAA Admin	0	0	0	0	0
110: Elderly Services General	0	826,923	826,923	826,923	0
115: HCBS Unmet Needs	0	0	0	0	0
120: Case Management	0	0	0	0	0
125: Senior Living Program Base	0	0	0	0	0
126: Senior Living Pgm Supplemental	0	0	0	0	0
127: Senior Living Pgm Case Management	0	0	0	0	0
160: RSVP	0	0	0	0	0
170: Resident Advocate Coordinator	0	0	0	0	0
180: Title IIIB Supportive Services	43,322	465,418	508,740	508,740	0
190: Title IIIC(1) Congregate Meals	0	573,652	573,652	573,652	0
200: Title IIIC(2) HD Meals	0	238,692	238,692	238,692	0
215: Title IIIE Caregiver Support	14,441	182,272	196,713	196,713	0
216: Title IIIE Grandparent/Older Relative	0	0	0	0	0
220: Title IIID Preventive Health	0	12,018	12,018	12,018	0
221: Title IIID Preventive Health Med Mgmt	0	0	0	0	0
235: Title XIX Assessment	0	0	0	0	0
250: NSIP Cash Estimate	0	319,013	319,013	319,013	0
260: NSIP Commodities	0	0	0	0	0
IDEA Sub-total:	\$57,763.00	\$2,617,988.00	\$2,675,751.00	\$2,675,751.00	\$0.00
Resources - Non-IDEA					
280: Federal Non-IDEA	0	371,679	371,679	371,679	0
290: State Non-IDEA	0	26,519	26,519	26,519	0
300: Local Public Funds	0	690,445	690,445	690,445	0
310: Other Local Cash	0	712,526	712,526	712,526	0
311: Medical Assistance Waiver	0	0	0	0	0
315: Senior Living Pgm Fees	0	0	0	0	0
316: Senior Living Pgm Contributions	0	0	0	0	0
320: Non-Cash	0	632,966	632,966	632,966	0
330: Pgm Inc IIIB Supportive Svcs	0	1,800	1,800	1,800	0
340: Prog Inc IIIC(1) Congregate Meals	0	296,430	296,430	296,430	0
350: Prog Inc IIIC(2) HD Meals	0	519,675	519,675	519,675	0
363: Prog Inc IIIE Caregiver Support	0	7,050	7,050	7,050	0
364: Prog Inc IIIE Grandparent/Older Relative	0	0	0	0	0
365: Prog Inc IIID Preventive Health	0	0	0	0	0
366: Prog Inc IIID Preventive Health Med Mgmt	0	0	0	0	0
370: Program Income Other	0	935,460	935,460	935,460	0
Non-IDEA Sub-total:	\$0.00	\$4,194,550.00	\$4,194,550.00	\$4,194,550.00	\$0.00
TOTAL:	\$57,763.00	\$6,812,538.00	\$6,870,301.00	\$6,870,301.00	\$0.00

Remarks: Copied from FY 2014, AAA 10, Report Type B, Version 1


3/29/13

 Authorized Signature

Submitted by: sa
 Submitted: 3/26/2013

SERVICE	General Aging	Total Service Units	Total Undup Clients	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	586	11	5	1		4		
3: Chore	General Aging	1,084	72	35	2		24		
4: HD Meals	General Aging	269,353	2,160	1,037	63	7	713		
5: Adult Daycare	General Aging	8,896	60	29	2		20		
6: Case Management	General Aging	7,542	1,141	548	33	3	377		
7: Congregate Meals	General Aging	138,852	2,840	1,363	82	9	937		
8: Nutrition Counseling	General Aging	102	102	49	3		34		
9: Assisted Transportation	General Aging	2,066	260	125	8	1	86		
10: Transportation	General Aging	115	77	37	2		25		
11: Legal Assistance	General Aging	660	544	261	16	2	180		
12: Nutrition Education	General Aging	3,582	3,582	1,717	104	11	1,180		
13: Information & Assistance	General Aging	3,952	2,371	1,138	69	7	782		
14: Outreach	General Aging	4,264	4,264	2,047	124	13	1,407		
B02: Health Promotion	General Aging	81	81	39	2		27		
B03: Respite	General Aging	5,898	122	59	4		40		
B05: Mental Health Outreach	General Aging	709	22	11	1		7		
B06: Medication Management	General Aging								
B07: Evidence Based Health Activities	General Aging	60	60	29	2		20		
C01: Advocacy	General Aging								
C05: Legal Education	General Aging	360	30	14	1		10		
C10: Cash and Counseling	General Aging								
C11: Money Management	General Aging	45	7	3			2		
D01: Training & Education	General Aging	115	77	37	2		25		
D02: Recreation Activities	General Aging								
D03: Reassurance/Visiting	General Aging								
E01: Counseling	General Aging								
E02: Placement Svc	General Aging								
E03: Assessment & Intervention	General Aging	566	49	24	2		16		
E05: Options Counseling	General Aging	1,128	376	181	11	1	124		
F02: Material Aide	General Aging	411	59	29	2		20		
F03: Public Information	General Aging	4,535	4,535	2,177	132	14	1,497		

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SERVICE	Total Service Units	Total Undup Clients	60+ Rural	60+ Minority	60+ Minority Below Poverty	60+ Below Poverty	SLP Low Income	SLP Moderate Income
CG1: CG Access Assistance	Caregiver 500	500	240	15	2	165		
CG2: CG Cash and Counseling	Caregiver 35	35	17	1		12		
CG3: CG Counseling	Caregiver 450	450	216	14	2	149		
CG4: CG Information and Assistance	Caregiver 350	302	145	9	1	100		
CG5: CG Respite	Caregiver 6,544	47	23	1		16		
CG6: CG Supplemental Services	Caregiver 35	35	17	1		12		
CG7: CG Home Delivered Meals	Caregiver							

Instructions are on page 23 of the Area Plan on Aging SFY 2014-2015 document.

**Attachment 1
Verification of Intent**

The Heritage Area Agency on Aging (AAA) accepts full authority and responsibility to develop and administer the SFY 2014-SFY 2015 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 the SFY 2014-SFY 2015 Area Plan on Aging, approves the Plan in its entirety, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

James Choate, Vice President and Chief Financial and Operations Officer, Kirkwood Community College (see Attachment 18)

Name: Chair, Governing Body


Signature

3-27-13
Date Signed

The Advisory Council has reviewed the SFY 2014-SFY 2015 Area Plan on Aging, approves the Plan in its entirety, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Shirley Geadelmann, Chair, Advisory Council

Name: Chair, Governing Body


Signature

3-28-13
Date Signed

The Executive Director has reviewed the SFY 2014-SFY 2015 Area Plan on Aging, approves the Plan in its entirety, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Ingrid Wensel, Executive Director

Name: Chair, Governing Body

Ingrid Wensel
Signature

3/26/13
Date Signed

Instructions are on page 23 of the Area Plan on Aging SFY 2014-2015 document.

**Attachment 2
Authorized Signatures**

The Heritage Area Agency on Aging

Name of Area Agency on Aging (Type)

Kirkwood Community College, 6301 Kirkwood Blvd. SW, PO Box 2068

Street Address

Cedar Rapids, Iowa 52406

City, State, Zip Code

Type of Agency: Separate organizational unit within a multi-purpose agency

Date of Area Agency Designation: 1971

Authorized Signatures for Funding Applications and Contracts

Ingrid Wensel
Signature of Executive Director

3/25/13
Date Signed

Shirley Goodlman
Signature of Chair, Governing Body

3-28-13
Date Signed

James Choate

3-27-13

Authorized Signatures for Fiscal Reports

Ingrid Wensel
Signature of Executive Director

3/25/13
Date Signed

Shirley Goodlman
Signature of Chair, Governing Body

3-28-13
Date Signed

Sala M. Waters
Signature of Treasurer

3-27-13
Date Signed

Authorized Signatures for Program Reports

Ingrid Wensel
Signature of Executive Director

3/25/13
Date Signed

J. G. [Signature]
Signature of Program Director/Coordinator

3-27-13
Date Signed

Instructions are on page 23 of the Area Plan SFY 2014-2015 document.

**Attachment 3
Governing Body**

Governing Body of The Heritage Area Agency on Aging (separate organizational unit within a multipurpose agency, please see Attachment 18 for explanation)

Name of Area Agency on Aging (Type)

Chair

Name: Lois Bartelme

Address: 946 23rd Avenue Place #2

City & Zip Code: Coralville, Iowa 52241

County: District III: Johnson & Linn

Phone: 319-331-2410

E-mail: loisbart@aol.com

Term Expires: 10/2013

Vice-Chair

Name: James Mollenhauer

Address: 3279 Stone Court

City & Zip Code: Marion, Iowa 52302

County: District VII: Linn & Jones

Phone: 319-431-4374

E-mail: jmollen@kirkwood.edu

Term Expires: 10/2013

Secretary/Secretary Treasurer

Name: Sheryl Cook (appointed, see Attachment 18)

Address: Kirkwood Community College

City & Zip Code: Cedar Rapids, Iowa 52406

County: n/a

Phone: 319-398-5500

E-mail: scook@kirkwood.edu

Term Expires: n/a

Treasurer (if separate officer)

Name: James Choate (appointed, see Attachment 18)

Address: Kirkwood Community College

City & Zip Code: Cedar Rapids, Iowa 52406

County: n/a

Phone: 319-398-7612

E-mail: jim.choate@kirkwood.edu

Term Expires: n/a

Other Members

Name: Keith Stamp

City/County: Monticello/District 1: Jones

Phone: 1-800-332-8488 x6850

E-mail: kstamp@aea10.k12.ia.us

Name: Elaine Harrington

City/County: Watkins/District VI: Benton & Linn

Phone: 319-227-7868

E-mail: eharrin@kirkwood.edu

Name: Paul Glenn

City/County: Mechanicsville/District II: Cedar & Linn

Phone: 563-432-7710

E-mail: gshari54@yahoo.com

Name: John Swanson

City/County: Cedar Rapids/District IX: Linn

Phone: 319-363-4629

E-mail: jwsktd@msn.com

E-mail: _____

Other Members (continued)

Name: Karen Gorham

City/County: Washington/District IV: Washington

Phone: 319-653-5352

E-mail: kgorham@kirkwood.edu

Name: John Hall

City/County: North English/District V: Iowa & Johnson

Phone: 309-787-0714

E-mail: jhall@kirkwood.edu

Name: Marcia Rogers

City/County: Cedar Rapids/District VIII: Linn

Phone: 319-395-9777

E-mail: marciarogers@imonmail.com

Name: _____

City/County: _____

Phone: _____

E-mail: _____

Name: _____

City/County: _____

Phone: _____

Name: _____

City/County: _____

Instructions are on page 23 of the Area Plan SFY 2014-2015 document.

**Attachment 4
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)

The Heritage Area Agency on Aging currently meets all 7 composition criteria.

Advisory Council of: The Heritage Area Agency on Aging (separate organizational unit within a multipurpose agency, please see Attachment 18 for explanation)

Name of Area Agency on Aging (Type)

Chair

Name: Shirley Geadelmann
Address: 1730 170th Street
City, State, Zip Code: Clarence, Iowa 52216
County: Cedar
Phone: 563-452-4183
E-mail: n/a
Term Expires: 6/30/2014
OAA Composition Criteria (1 to 7): 1,2,5,7

Vice - Chair

Name: Robert Welsh
Address: 84 Penfro Dr.
City, State, Zip Code: Iowa City, Iowa 52246
County: Johnson
Phone: 319-354-4618
E-mail: welshbob@aol.com
Term Expires: 6/30/2013
OAA Composition Criteria (1 to 7): 1,2,4,5,7

Secretary or Secretary Treasurer

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

Treasurer (if separate officer)

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

Other Members

Name: Nancy Farmer
City/County: Vinton/Benton
Phone: 319-472-6371
E-mail: nfarmer@vghinc.com
OAA Composition Criteria (1 to 7): 2,3,4,7

Other Members

Name: Richard Jacoby
City/County: Victor/Iowa
Phone: 319-622-3014
E-mail: rljacoby@netins.net
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: Ivan Reihmann
City/County: Middle Amana/Iowa
Phone: 319-622-3014
E-mail: baron@mediacombb.net
OAA Composition Criteria (1 to 7): 1,2,4,5,7

Name: Kice Brown
City/County: Lone Tree/Johnson
Phone: 319-629-5524
E-mail: kice@iowatelecom.net
OAA Composition Criteria (1 to 7): 1,2,4,6,7

Name: Karen Davis
City/County: Tiffin/Johnson
Phone: 319-499-0043
E-mail: northlibertylivingcenter410@gmail.com
OAA Composition Criteria (1 to 7): 7

Name: Lee McGovern
City/County: Iowa City/Johnson
Phone: 515-554-7494
E-mail: leemcgovern@q.com
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: David Cavey
City/County: Olin/Jones
Phone: 319-354-4618
E-mail: exmayorcavey@netins.net
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: Ned Rohwedder
City/County: Olin/Jones
Phone: 319-462-2282
E-mail: ncrohwedder@gmail.com
OAA Composition Criteria (1 to 7): 2,6

Name: Sandra Bell
City/County: Cedar Rapids/Linn
Phone: 319-365-6107

E-mail: sdemowiz@aol.com
OAA Composition Criteria (1 to 7): 1,2,5,7
Name: John Elliott
City/County: Cedar Rapids/Linn
Phone: 319-396-4762
E-mail: elliottjnc@aol.com
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: Keith Griem
City/County: Cedar Rapids/Linn
Phone: 319-365-1626
E-mail: griemk@q.com
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: Alice King
City/County: Cedar Rapids/Linn
Phone: 319-393-4565
E-mail: n/a
OAA Composition Criteria (1 to 7): 1,2,7

Name: Bob King
City/County: Cedar Rapids/Linn
Phone: 319-393-4565
E-mail: king.robert@imonmail.com
OAA Composition Criteria (1 to 7): 1,2,7

Name: Ron Rath
City/County: Cedar Rapids/Linn
Phone: 319-365-6143
E-mail: rkerath@gmail.com
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: Nancylee Siebenmann
City/County: Cedar Rapids/Linn
Phone: 319-365-4117
E-mail: siebenmannN@usa.redcross.org
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: Gregory Van Egdon
City/County: Kalona/Washington
Phone: 319-331-5009
E-mail: gvanegdon@gmail.com
OAA Composition Criteria (1 to 7): 1,2,5,7

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

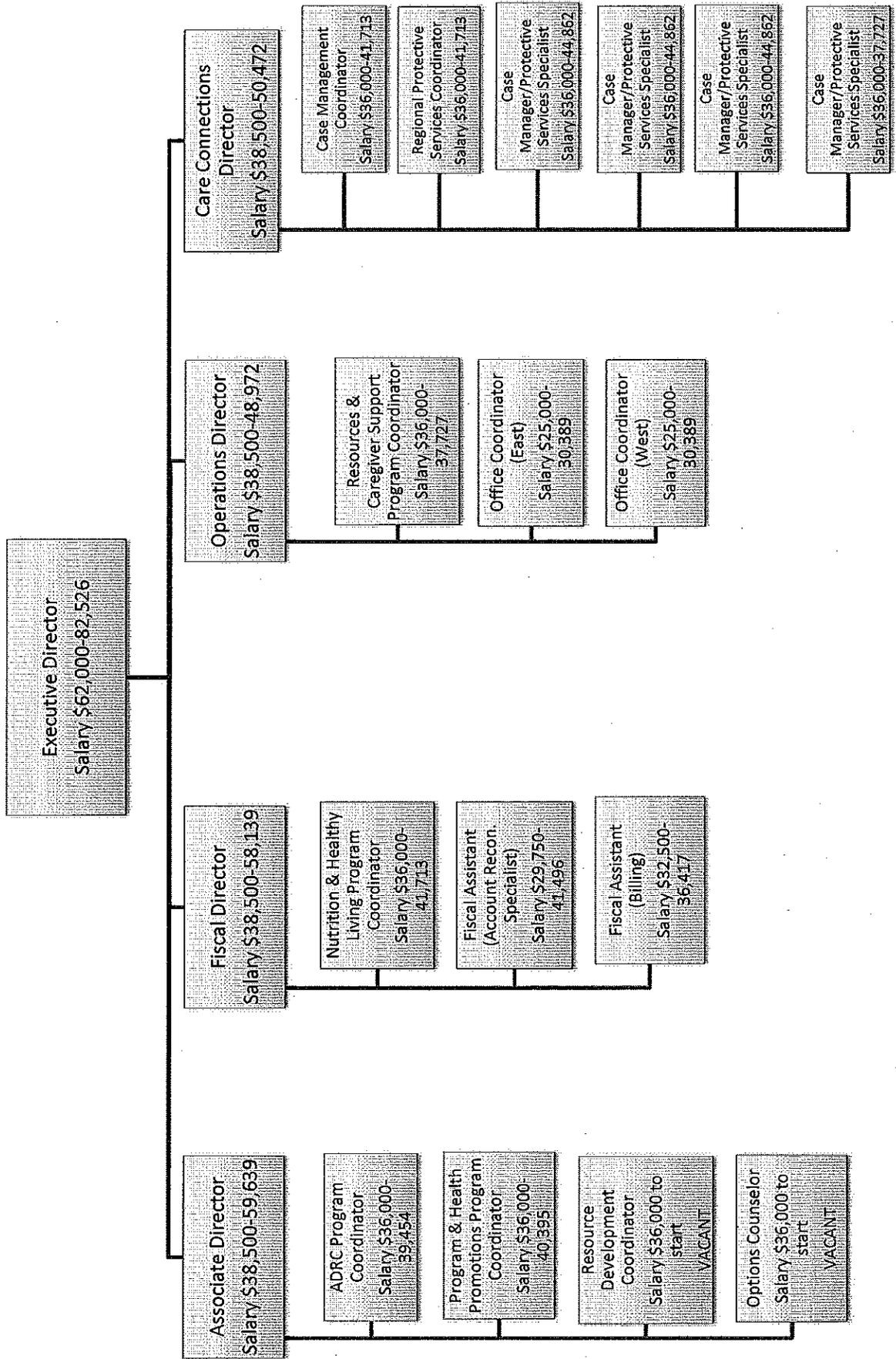
Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Name: _____
City/County: _____
Phone: _____
E-mail: _____
OAA Composition Criteria (1 to 7): _____

Attachment 5: Table of Organization
 The Heritage Area Agency on Aging
 FY 14-15 Area Plan Submission
 4/1/13

Heritage currently employs 19 full time positions, with 2 full time positions in the process of being hired, for a total of 21 full time positions.
 Heritage does not have any part time staff.





The Heritage Agency Advisory Council By Laws

Heritage Area Agency on Aging - Kirkwood Community College

Article I

Name of Organization

The name of this organization is the Advisory Council of the Heritage Area Agency on Aging - Kirkwood Community College.

[Definitions: Hereafter, the term "Council" will mean the Advisory Council; "Agency" will mean the Heritage Area Agency on Aging, and "Task Force" will mean the County Task Force(s).]

Article II

Mission of Organization

The mission of the Council is to assist the Agency in:

1. Planning, funding, and advocating for older adults, caregivers and people with disabilities.
2. The development and administration of the area (strategic) plan.
3. Conducting public meetings that relate to aging and disability issues.
4. Representing the ongoing interests of older persons (60+) and people with disabilities residing in Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties in Iowa.
5. Reviewing and commenting on community policies, programs and actions which affect older persons and people with disabilities as appropriate with the intent of assuring maximum coordination and responsiveness.



The Heritage Agency Advisory Council By Laws

Article III

Encompassing Duties and Responsibilities of the Council:

1. **Advocacy:** To comment on policies, programs and actions which affect older adults and people with disabilities as appropriate at the community, county, state and federal levels.
2. **Planning:** To advise on the administration of the area plan, program and funding priorities, policies, and to participate in public hearings.
3. **Communications:**
 - a. To serve as an information link between the Agency and the public.
 - b. To serve as an information link between and resource for the Agency and Task Forces.
4. **Resource Development:** To assist in generating local support for the development of senior-related programs and the operation of the Agency.
5. **Education:** To keep informed of activities, policies and proposals that affect the individuals and caregivers served by the Agency and programs offered.

Article IV

Membership of the Area Advisory Council

1. There shall be two (2) levels of Council membership: official (voting – elected and appointed, if necessary) and ex-officio (non-voting).
2. **Official members:**
 - a. **Size of membership:** The Council shall be composed of twenty two(22) voting members representing the Task Forces and up to three (3) additional appointed voting members representing the following areas, if criteria is not satisfied through the Task Force elected members:
 - Representative of health care provider organization, including providers of veterans' health as appropriate
 - Representative of supportive services providers organizations
 - Local elected official

In the event appointments are necessary to be made to be compliant with Agency by-laws, Older Americans Act regulations or any other state or federal law, they will be considered at-large appointments, representing all



The Heritage Agency Advisory Council By Laws

seven (7) counties served. Appointments will be made by the Agency Director or Chair with all practical effort made to rotate the county from which the individual(s) reside.

- b. **Geographic representation:** Each Task Force shall be entitled to a fixed number of members. Benton, Cedar, Iowa, Jones and Washington counties shall have two (2) members each, Johnson shall have four (4) members and Linn shall have eight (8) members. Members and alternates shall be selected according to the processes outlined in the Task Force by-laws.
 - c. **Alternates:** Each Task Force shall be entitled to appoint at least three alternates. Alternates are voting members of the Council only when they have been asked to substitute for a regular member.
 - d. **Notification:** The names of the Council members and alternates shall be submitted to the Chair of the Council by May 15th by the chairs of the respective Task Forces for the next fiscal year, beginning July 1st.
 - e. **Length of term:** Members shall take office July 1st and serve through the following June 30th.
 - f. **Age Requirement:** At least 51% of the Council membership shall be sixty (60) years of age or older.
 - g. **Vacancies.** In the event of a vacancy on the Council, a replacement will be selected in the same manner as the original member (2.b.), and notice will be given to the Council Chair.
3. **Ex-officio membership:**
- a. The Agency Director or his/her staff designee is an ex-officio (non-voting) member.
 - b. Ex-officio member is not subject to age requirements.

Article V

Officers

1. The officers of the Council shall be the Chair and Vice Chair. The Chair and Vice Chair of the Council shall be elected by the Council from among its official members at the July meeting for a one (1) year term. Terms are in accordance with the Agency's fiscal year which is July 1 through June 30.
2. The Chair and Vice Chair of the Council may serve a maximum of three (3) consecutive terms.
3. **Duties and responsibilities of officers:**
 - a. **Chair**
 - 1) Shall preside at the meetings of the Council.
 - 2) Shall have general supervision of all Council activities.



The Heritage Agency Advisory Council By Laws

- 3) Shall serve as an ex-officio member of all committees.
- b. **Vice-Chair**
- 1) Shall assist the Chair in the conduct of the business of the Council.
 - 2) Shall act in the absence of the Chair.
 - 3) Shall have other and additional duties as from time-to-time may be delegated to him/her by the Chair.
 - 4) Shall review Council attendance records in March or before and notify Task Force Chairs and Task Force Membership Committees of findings in the event of excessive absences or lack of participation in Council activities. This information will be considered by the Task Force in elections in the following year.
 - 5) Shall work with the Chair, Agency Director and other members of the Council to create a slate of officers to be presented at the July meeting for that year's Chair and Vice Chair appointments. Nominations may also come from the floor at that meeting.

Article VI

Meetings of the Advisory Council

1. **Meeting schedule:** Regular meetings of the Council shall be held at least quarterly, at a time determined by the Council.
2. **Special meetings:** Special meetings of the Council may be called by the Agency Director, the Chair, or, upon the written request of five (5) members of the Council. Written notice to all members must be given at least five (5) working days prior to the special meeting and must include the purpose of the meeting, time and place.
3. **Notice of meetings:** Notices for regular meetings shall be given in the form of an agenda mailed to all members not less than five (5) working days prior to the meeting. This mailing will include the minutes of the previous meeting. A mailing will be an official mailing in hard copy or electronic form.
4. **Secretarial Duties:** The Director shall appoint a recording secretary to take minutes of all Council meetings.
5. **Robert's Rules of Order:** Order of meetings of the Council shall be in accordance with Robert's Rules of Order, revised, except insofar as modified by these by-laws and the rules and procedures adopted by the Council.



The Heritage Agency Advisory Council By Laws

Article VII

Quorum

A quorum at any regular, special, or committee meeting of the Council shall consist of 1/2 of the official (voting) members.

Article VIII

Committees

1. **Types:** There are two (2) types of Council committees: standing committees and ad hoc committees.
2. **Standing:** The Council shall have four (4) standing committees, 1) the Planning, Program and Budget Committee, 2) the Community Relations Committee, 3) the Advocacy/Government Liaison Committee, and 4) the Resource Development Committee.
3. **Ad hoc:** The Chair or Agency Director shall appoint ad hoc committees and their chairs, to assist in carrying out the various functions of the Council and/or to make studies and recommendations in specified problem or program areas. Membership to ad hoc committees may include persons who are not official members to the Council.
4. **Participation:** Each official member of the Council, where feasible, will serve on at least one (1) and a maximum of two (2) Council standing committees.
5. **Composition of Standing Committees:**
 - a. **The Planning, Program and Budget Committee** will be composed of two (2) members from each of the Task Forces, with the exception of Linn County, which shall have four (4) members. One of these members shall be the Chair of the Task Force (or his/her designee) and the other will be a Task Force member nominated by the Task Force chair and elected by the Task Force.
 - b. **The Community Relations Committee** will be composed of one (1) member from each of the Task Forces. The Task Force Chair shall nominate, and the Task Force elect this representative who do not need to be a member of the Council itself, but it is preferred.
 - c. **The Advocacy/Government Liaison Committee** will be composed of members from each of the Task Forces and additional invited advocates not serving on the Council or other committee of the Agency. Each Task Force may nominate and elect as many individuals to this committee as they choose and invite others from their communities, however, only official Task Force members have voting rights. The general public (non-task force members) serve as ex-officio members of the Advocacy/Government Liaison Committee.



The Heritage Agency Advisory Council By Laws

- d. **The Resource Development Committee** shall be comprised of invited and appointed members not serving on the Council or other committees of the Agency. These invited members may have specific skill/talents/backgrounds that would enhance the responsibilities of the Committee and shall include persons who are not official members of the Council or Task Forces by who work or live in one of the seven (7) counties served by the Agency, committing to a minimum two (2) year term of office.

The Resource Development Committee, at a minimum, will also be comprised of one (1) member from each of the Task Forces, nominated by the Task Force chairs and elected by the Task Force members. In addition, the Resource Development Committee Chair may appoint ad hoc committees as needed.

6. **Notice of appointment:** The names of the Standing Committee members shall be submitted to the Chair of the Council (through the Agency office) by May 15th (with the exception of the Resource Development Committee).
7. **Election of standing committee chair and vice chair:** The election of all standing committee's (with exception of the Resource Development Committee) chairs and vice chairs shall occur at the regularly scheduled July meeting or the first meeting of the fiscal year.
8. **Committee chair term limits:** The Chair and Vice Chair may serve a maximum of three (3) consecutive one (1) year terms.
9. **Standing Committee Duties and Responsibilities:**
- a. **Duties and responsibilities of the Planning, Program and Budget Committee are as follows:**
- 1) To analyze the program needs of older persons and other concerned citizens residing in the Agency service area and recommend priorities.
 - 2) To make recommendations to the Agency Director in regards to the budget and program activities to be addressed during the coming fiscal year.
 - 3) To provide the Council with periodic program and budget updates.
 - 4) To elect a Chair and Vice Chair. The Chair must be an official member of the Council.
 - 5) To communicate with the Task Forces, involving them and others, where feasible, in the planning, development and implementation of program activities and priorities.
- b. **Duties and responsibilities of the Community Relations Committee are as follows:**
- 1) To provide direction and input regarding volunteer recruitment and diversity promotion.
 - 2) To draft revisions to the Council by-laws as appropriate and present them to the Council members for action and to the Task Force for their information.
 - 3) To prepare a slate of Council officer nominees to be presented to the Council in the event that there are no nominations presented by the Vice Chair of the Council or from the floor during the July Council meeting.



The Heritage Agency Advisory Council By Laws

- 4) To serve as official ambassadors for the Agency. Duties may include, but not limited to: selection of volunteer award recipients and serving as hosts at special events, such as volunteer recognition.
 - 5) To work with the Community Relations Committee of each Task Force, where feasible, in the planning, development and implementation of trainings, Task Force priorities and plans.
 - 6) To elect a Chair and Vice chair. If the Chair is not a member of the Council, they may submit a report to the Council to be read by a member of the Council or staff designee on the committee's behalf or the Chair may also attend the Council meetings to provide an official report from the committee.
- c. **Duties and responsibilities of the Advocacy/Government Liaison ~~Relations~~ Committee are as follows:** *9/27/12 correction*
- 1) To encourage older adults, people with disabilities, and the general public to actively advocate on behalf of older adults and people with disabilities and to participate in the state and federal legislative and policy making process.
 - 2) To increase the knowledge older adults, people with disabilities, and other advocates have of their elected officials and policy makers and the impact they have on areas of interest and the people served by the Agency and programs offered within.
 - 3) To educate local, state, and federal elected officials and policy makers about the concerns and interests of older adults and people with disabilities.
 - 4) To seek and encourage partnerships with individuals and organizations that share similar legislative and public policy agendas in order to strengthen the efforts of advocates for older adults and people with disabilities.
- d. **Duties and Responsibilities of the Resource Development Committee are as follows:**
- 1) Work with the Agency staff and the Kirkwood Foundation to develop ongoing fundraising activities that will enhance the position of the agency and the financial solvency of the Older Iowan's Fund (OIF).
 - 2) Receive periodic reports from the Agency staff regarding the progress of the Older Iowan's Fund (OIF).
 - 3) Meet at least four (4) times a year as a total committee to provide recommendations, support and assistance with the activities of the Agency staff and to identify possible planned giving prospects and other resource development activities that may need to occur.
 - 4) To report to the Planning, Program and Budget Committee the funds that are recommended for distribution.



The Heritage Agency Advisory Council By Laws

Article IX

Ethics Policy

1. **Conflict of Interest:** All Task Force and Council members should make known any possible conflict of interest and be made a matter of record through an annual procedure and also when the interest becomes a matter of action. Conflicting interests can include, but not limited to, financial, personal relationships, status or power. Any new member will be advised of this conflict of interest policy upon entering duties of his/her office.
2. **Abstain from Voting and Influencing:** Any member having a possible conflict of interest on any matter shall abstain from voting on that matter and shall not use his/her influence on the matter. However, any member with a possible conflict of interest may answer questions about the matter from others after the disclosure of the conflict of interest has been made.
3. **Confidentiality:** The Heritage Agency strongly values the privacy of our clients and program participants. We strive to provide our services to those in need with the utmost dignity and privacy. Members are expected to keep any sensitive information about individuals confidential.
4. The Heritage Agency staff members and volunteers shall not accept gifts, goods or services as remuneration for work completed on behalf of the Council and/or the Agency. All parties are required to follow all policies and procedures of The Heritage Agency and Kirkwood Community College.
5. Compliance with the Ethics Policy covers obeying the law, respect for the worth and dignity of individuals, diversity, fairness, openness, honesty, prudent application of organizational resources, and professional conduct in service to others.
6. Failure to comply with the minimum standards of the Ethics Policy will result in removal from office or appointment.



The Heritage Agency Advisory Council By Laws

Article X

Amendments to the By-Laws

The Council, by approval of two-thirds of the voting members present at a meeting, may amend the by-laws provided that written notice of the proposed amendments are furnished to the members ten (10) days prior to the meeting at which the proposed amendments are to be considered.

These amended by-laws were adopted at a meeting of the Advisory Council on the 27th day of September 2012, to be effective immediately by a majority of the Council.

THE HERITAGE AGENCY

By Shirley Geadelmann
Shirley Geadelmann, Advisory Council Chair

By Ingrid Wensel, Director
Ingrid Wensel, Director



The Heritage Agency County Task Force By-Laws

Article I

Name of Organization

The name of this organization is the _____ (insert county names) _____ County Task Force on Aging, a grassroots affiliate of the Heritage Area Agency on Aging (HAAA), a department of Kirkwood Community College.

Article II

Mission Statement:

The purpose of this Task Force is to:

1. Advocate for the physical, social, economic and public policy benefit of older persons (as defined in the Older American's Act of 1965 as amended).
2. Determine the needs of older persons, promote new and existing programs and policies that address the needs in planning, funding and advocating for older adults, caregivers, and people with disabilities..

Article III

Duties and responsibilities of the County Task Force on Aging shall encompass the following areas:

1. **Planning:** To assist HAAA in all aspects of program planning that affect the physical, social, economic and public policy concerning older adults.
2. **Resource development:** To identify all available resources (e.g., private and public funding, volunteer, etc.) that can enhance programming provided to benefit older persons and people with disabilities through the auspices of the HAAA and to assist the HAAA in acquiring same.
3. **Community Advocacy:** To advocate for the physical, social, economic and legislative concerns of older persons (age 60+) among all city, county, state, federal offices, as well as private (e.g., the United Way) and volunteer organizations operating in this county.
4. **Information sharing:** To encourage an informed membership through the ongoing education of Task Force members or other community groups through formalized activities (e.g., public meetings, workshops, etc.) about critical issues impacting the populations served by HAAA.
5. **Elections/Appointments:** To elect/appoint the representatives to the Advisory Council and standing committees.
6. **Recruit/notify:** To identify individuals willing to serve on the Task Force and notify the HAAA so the names can be submitted for appointment.



The Heritage Agency County Task Force By-Laws

Article IV

Membership of the County Task Force

1. There shall be two (2) levels of Task Force membership: official (voting) and ex-officio (non-voting).
2. **Official members:**
 - a. **Mission-oriented:** Members of the Task Force shall be those who are interested in the mission of the Task Force and are willing to contribute their time and talents to achieve the mission.
 - b. **Geographic representation:** Members shall represent as many geographic areas of the county as possible. Members must live or work in the area they represent.
 - c. **Size of membership:** The Task Force shall have at least ten (10) members, whenever possible. The maximum number shall be identified annually by the Task Force.
 - d. **Age:** Persons age 60 and over shall comprise at least 51% of the total official membership.
 - e. **Appointment:** Members are appointed to the Task Force by the Kirkwood Community College Board of Trustees on or before June 30th of each year. Each Task Force shall submit a recommended roster to HAAA by May 15th.
 - f. **Length of term:** Members shall be appointed annually to a one (1) year term. Members shall take office July 1st and serve through the following June 30th.
 - g. **Term limit:** Members may serve a maximum of six (6) consecutive years and may only be re-appointed following a hiatus of at least twelve (12) months.
 - h. **Absences:** Task Force members are expected to attend all scheduled meetings. In the event this is not possible, a member is expected to notify an officer or the HAAA staff designee to the Task Force of his/her anticipated absence. In the event that a Task Force member misses three (3) meetings without notification, the member can be removed from the Task Force membership roster and shall not be eligible for another term for one (1) year at least. Members with poor attendance, excused or not, are not encouraged to be recommended by the Task Force for reappointment the following year except where an out-of-area trip or extended medical condition justify the absences.
 - i. **Resignations:** A Task Force member who determines that he/she cannot fulfill his/her term of office is encouraged to submit his/her resignation to the Task Force Chair.
3. **Ex-officio members:**
 - a. **Ex-officio:** There may be ex-officio (non-voting) members. This may include: past Task Force members who are no longer able to serve as active official members due to reasons of poor health or unusual circumstances, past members who have served six (6) consecutive years and are on twelve (12) month hiatus; the Director of the HAAA and his/her designees; staff members of organizations that receive funding from the HAAA or other community leaders.



The Heritage Agency County Task Force By- Laws

- b. **Purpose:** The purpose of appointing ex-officio Task Force members is to strengthen the expertise and networking relationships available to the Task Force. All ex-officio members should be willing to assist the Task Force in some capacity.
- c. **Appointment:** Ex-officio members shall be appointed by the Task Force and a list submitted to HAAA on or before May 15th of each year if they are willing to serve in this capacity.
- d. **Length of Term:** Ex-officio members shall be appointed annually to a one (1) year term. Members shall take office July 1st and serve through the following June 30th.

Article V

Officers

1. The officers of the Task Force shall be a Chair, a Vice Chair and a Secretary, to be elected by Task Force members at or before the May meeting. The new officers shall take office July 1st.
2. An elected officer may serve a maximum of three (3) consecutive terms in the same elected office and may be re-elected after a twelve (12) month hiatus.
3. In the event that an officer is unable to complete his/her term of office, the Chair will appoint an ad hoc Nominating Committee to present a nominee to the Task Force at the next regular meeting.
4. Duties and responsibilities of officers:
 - a. **Chair**
 - 1) Shall plan the agenda, with the assistance of the HAAA Director and/or his/her designee.
 - 2) Shall conduct all meetings of the Task Force, be responsible for the appointment of members to Task Force committees and other Task Force business.
 - 3) Shall be responsible for nominating representatives to Advisory Council and standing committees of the Advisory Council in the event of a vacancy. The Task Force will then elect those nominees.
 - 4) Shall appoint an ad hoc Nominating Committee at or before the March meeting and as needed to fill officer vacancies.
 - 5) May serve as ex-officio member of all committees of the Task Force except the Nominating Committee.
 - 6) Shall nominate members, which the Task Force will elect to serve on the Advisory Council and the standing committees of the Advisory Council and submit the names to the HAAA Director or Advisory Council Chair by May 15th.
 - 7) Shall nominate the requisite number of Advisory Council representatives (see Article VI.1 below) and at least three (3) alternate representatives to the Advisory Council, which the Task Force will elect, and submit the names to the HAAA Director or Advisory Council Chair by May 15th.



The Heritage Agency County Task Force By-Laws

- b. **Newly-elected Chair** shall initiate all appointments and nominations in preparation for the new fiscal year.
 - 1) Shall submit initial Task Force level committee appointments to the HAAA office by June 30th.
- c. **Vice-Chair**
 - 1) Shall assist the Chair and fulfill the responsibilities of that office in the absence of the Chair.
 - 2) Shall perform other and additional duties as may be delegated to him/her by the Chair.
- d. **Secretary**
 - 1) Shall take the minutes and attendance at all Task Force meetings and forward them to the HAAA office within one week of the meeting for typing and/or distribution.
 - 2) Shall assist the Chair and Vice Chair as needed.

Article VI

Representative to the Advisory Council of the Heritage Area Agency on Aging

1. Each Task Force shall be represented on HAAA's Advisory Council with a fixed number of members. Benton, Cedar, Iowa, Jones and Washington counties shall have two (2) members each, Johnson shall have four (4) members and Linn shall have eight (8) members. It is preferable that one of the representatives to the Advisory Council be the County Task Force Chair.
2. Representatives shall be elected by the Task Force at or before the May meeting.
3. Each Task Force Chair shall identify and nominate a list of at least three (3) alternates, any of whom may substitute for elected Advisory Council representatives as needs arise.
4. The duties of the representatives shall be:
 - a. To attend all regular and specially called meetings of the Advisory Council or to arrange for an alternate to attend.
 - b. To serve as liaison between the Advisory Council and the County Task Force.
 - c. To fulfill the duties and responsibilities of Advisory Council membership as defined in the by-laws of the Advisory Council.



The Heritage Agency County Task Force By-Laws

Article VII

Meetings of the Task Force

1. Regular meetings shall be held on the day selected by the Task Force, preferably during the first half of the month. Written notice of the date, time, place and agenda of the meeting shall be mailed at least one (1) week in advance of the scheduled Task Force meeting by the HAAA staff. These agendas will be posted in accordance with the open meeting laws.
2. Special meetings of the Task Force may be called by the Chair by giving five (5) days written notice of the time and place of such meetings to all members, or upon written request by three (3) voting members of the Task Force giving five (5) days notice.
3. Meeting agendas and arrangements shall be the responsibility of the Task Force Chair with appropriate consultation with the Director of the HAAA or designee, and other officers and committees.
4. All meetings of the Task Force shall be conducted in accordance with Robert's Rules of Order Revised, except insofar as modified by these by-laws and the rules and procedures adopted by the Task Force.

Article VIII

Quorum

A quorum shall consist of one half (1/2) of the official membership of the Task Force.

Article IX

Committees

1. **Types:** There may be two (2) types of Task Force committees: standing committees and ad hoc committees.
2. **Standing:** The Task Force must have at least one (1) standing committee, the Advocacy/Government Liaison Committee. Committee members will be appointed by the Task Force Chair and must consist of a minimum of three (3) members. Other standing committees may be determined by the Task Force as needed. Members may serve on more than one committee.
3. **Ad hoc:** The Task Force Chair may appoint any number of ad hoc committees necessary to carry on the work of the Task Force. Membership to ad hoc committees may include persons who are not generally on the Task Force, but who are familiar with HAAA, orientated to the mission of HAAA and recognize that the committee is an extension of HAAA.
4. **Appointment:** Committee members shall be appointed by the Task Force Chair and each committee shall consist of a minimum of three (3) members each.
5. **Committee chairs:** The Task Force chair shall appoint the chair of all committees.



The Heritage Agency County Task Force By-Laws

6. Committee duties and responsibilities:

- a. **Duties and responsibilities of the Advocacy/Government Liaison Committee** are as follows:
- 1) To encourage older adults, people with disabilities, and the general public to actively advocate on behalf of older adults and people with disabilities and to participate in the state and federal legislative and policy making process.
 - 2) To increase the knowledge older adults, people with disabilities, and other advocates have of their elected officials and policy makers and the impact they have on areas of interest and the people served by the Agency and programs offered within.
 - 3) To educate local, state, and federal elected officials and policy makers about the concerns and interests of older adults and people with disabilities.
 - 4) To seek and encourage partnerships with individuals and organizations that share similar legislative and public policy agendas in order to strengthen the efforts of advocates for older adults and people with disabilities.
 - 5) To work collaboratively with the Advisory Council Advocacy/Government Liaison Committee.
- b. **Duties of other standing and ad hoc committees** of the Task Force shall be developed in consultation with the HAAA Director or his/her designee and included in the Task Force's standing rules.
- 1) An **Ad hoc Nominating Committee** of at least three (3) official members shall be appointed by the Chair at or before the March meeting for the purpose of presenting a slate of nominees for officers to the Task Force at the May meeting and as needed to fill officer vacancies.

Article X

County Standing Rules & Goals

Annually each County Task Force decides the standing rules that will determine the goals and objectives that they plan to meet. These standing rules include the committees and the duties the committees will assume in order to accomplish the work of the Task Force.

Article XI

Ethics Policy

1. **Conflict of Interest:** All Task Force and Council members should make known any possible conflict of interest and be made a matter of record through an annual procedure and also when the interest becomes a matter of action. Conflicting interests can include, but not limited to, financial, personal relationships, status or power. Any new member will be advised of this conflict of interest policy upon entering duties of his/her office.
2. **Abstain from Voting and Influencing:** Any member having a possible conflict of interest on any matter shall abstain from voting on that matter and shall not use his/her influence on the matter.



The Heritage Agency County Task Force By-Laws

However, any member with a possible conflict of interest may answer questions about the matter from others after the disclosure of the conflict of interest has been made.

3. Confidentiality: The Heritage Agency strongly values the privacy of our clients and program participants. We strive to provide our services to those in need with the utmost dignity and privacy. Members are expected to keep any sensitive information about individuals confidential.
4. The Heritage Agency staff members and volunteers shall not accept gifts, goods or services as remuneration for work completed on behalf of the Council and/or the Agency. All parties are required to follow all policies and procedures of The Heritage Agency and Kirkwood Community College.
5. Compliance with the Ethics Policy covers obeying the law, respect for the worth and dignity of individuals, diversity, fairness, openness, honesty, prudent application of organizational resources, and professional conduct in service to others.
6. Failure to comply with the minimum standards of the Ethics Policy will result in removal from office or appointment.

Article XII

Amendments to the By-laws

The Advisory Council, by approval of two-thirds (2/3) of the voting members present at a meeting, may amend the by-laws at any time provided that written notice of the proposed amendments are furnished ten (10) days prior to the meeting at which the proposed amendments are to be considered.

Revised 6/96, reviewed 7/99, Revised 11/00, Revised __/03, Revised 04/09, Revised 03/2012, Revised 09/2012

These amended Task Force by-laws were adopted at a meeting of the Advisory Council on the 27th day of September, 2012, to be effective immediately by a majority of the Council.

THE HERITAGE AGENCY

By Shirley Geadelmann
Shirley Geadelmann, Advisory Council Chair

By Ingrid Wenzel
Ingrid Wenzel, Director

Instructions are on page 24 of the Area Plan SFY 2014-2015 document.

**Attachment 7: PSA 4 – The Heritage Agency
Table of 3A-1 Services by County Form
Mandatory and Other Services**

PSA 4: The Heritage Agency Mandatory & Other Services	Benton	Cedar	Iowa	Johnson	Jones	Linn
Case Management	<input checked="" type="checkbox"/>					
Congregate Meals	<input checked="" type="checkbox"/>					
Health Promotion	<input checked="" type="checkbox"/>					
Home Delivered Meals	<input checked="" type="checkbox"/>					
Information & Assistance	<input checked="" type="checkbox"/>					
Legal Assistance	<input checked="" type="checkbox"/>					
Nutrition Counseling	<input checked="" type="checkbox"/>					
Nutrition Education	<input checked="" type="checkbox"/>					
Other Service(s)	<input checked="" type="checkbox"/>					
Adult Day Care/Adult Day Health	<input checked="" type="checkbox"/>					
Evidence-Based Health Activities	<input checked="" type="checkbox"/>					
Options Counseling	<input checked="" type="checkbox"/>					
Outreach	<input checked="" type="checkbox"/>					
Respite	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Transportation	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
PSA 4: The Heritage Agency Mandatory & Other Services	Washington					
Case Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Congregate Meals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Promotion	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Delivered Meals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information & Assistance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal Assistance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nutrition Counseling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nutrition Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Day Care/Adult Day Health	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evidence-Based Health Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Options Counseling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outreach	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respite	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>					

**Attachment 8
Nutrition Services**

	Location					Services (one service per line)	Breakfast					Lunch						
	Name	Street Address	County	City	Zip	Home Delivered(H) Congregate (C) Frozen (F) Shelf Stable(S)	M	T	W	TH	F	S/S	M	T	W	TH	F	S/S
1	Aging Services, Inc.	1725 O Ave NW	Cedar Rapids	IA	52405	C							X	X	X	X	X	
2	Amana Church Society	PO Box 91	Middle Amana	IA	52207	H							X	X	X	X	X	
3	Anamosa/Jones County Senior Center	112 North Ford Street	Anamosa	IA	52205	C							X	X	X	X	X	
4	Anamosa/Jones County Senior Center	112 North Ford Street	Anamosa	IA	52205	H							X	X	X	X	X	
5	Anamosa/Jones County Senior Center	112 North Ford Street	Anamosa	IA	52205	F							X	X	X	X	X	
6	Anamosa/Jones County Senior Center	112 North Ford Street	Anamosa	IA	52205	S							X	X	X	X	X	
7	Belle Plaine Community Center	1309 - 5th Avenue	Belle Plaine	IA	52208	C							X	X	X	X	X	
8	Belle Plaine Community Center	1309 - 5th Avenue	Belle Plaine	IA	52208	H							X	X	X	X	X	
9	Belle Plaine Community Center	1309 - 5th Avenue	Belle Plaine	IA	52208	F							X	X	X	X	X	
10	Belle Plaine Community Center	1309 - 5th Avenue	Belle Plaine	IA	52208	S	X	X	X	X	X							
11	Bennett Legion Hall	American Legion Hall	Bennett	IA	52721	C							X	X	X	X	X	
12	Blairstown Community Center	305 Locust St	Blairstown	IA	52209	C										X		
13	Blairstown Community Center	305 Locust St	Blairstown	IA	52209	H							X	X	X	X	X	
14	Blairstown Community Center	305 Locust St	Blairstown	IA	52209	F							X	X	X	X	X	
15	Central City	Falcon Civic Center	Central City	IA	52214	C							X	X	X	X	X	
16	Central City	Falcon Civic Center	Central City	IA	52214	H							X	X	X	X	X	
17	Central City	Falcon Civic Center	Central City	IA	52214	F							X	X	X	X	X	
18	Central City	Falcon Civic Center	Central City	IA	52214	S	X	X	X	X	X		X	X	X	X	X	
19	Clarence/Lowden	111 Orange Street	Tipton	IA	52772	H							X	X	X	X	X	
20	Durant	806 - 4th Avenue	Durant	IA	52747	H							X	X	X	X	X	
21	Durant	806 - 4th Avenue	Durant	IA	52747	F							X	X	X	X	X	
22	Ely Community Center	1570 Rowley St	Ely	IA	52227	C							X	X	X	X	X	
23	Ely Community Center	1570 Rowley St	Ely	IA	52227	H							X	X	X	X	X	
24	Hiawatha Community Center	80 Emmons St	Hiawatha	IA	52233	C							X	X	X	X	X	
25	Horizons, A Family Service Alliance	819 - 5th Street SE	Cedar Rapids	IA	52401	H	X	X	X	X	X	X	X	X	X	X	X	
26	Horizons, A Family Service Alliance	819 - 5th Street SE	Cedar Rapids	IA	52401	F							X	X	X	X	X	

**Attachment 8
Nutrition Services**

	Location					Services (one service per line)	Breakfast						Lunch					
	Name	Street Address	County	City	Zip	Home Delivered(H) Congregate (C) Frozen (F) Shelf Stable(S)	M	T	W	TH	F	S/S	M	T	W	TH	F	S/S
27	Horizons, A Family Service Alliance	819 - 5th Street SE	Cedar Rapids	IA	52401	S	X	X	X	X	X		X	X	X	X	X	
28	Iowa City Senior Center	28 South Linn	Iowa City	IA	52240	C							X	X	X	X	X	X
29	Iowa City Senior Center	28 South Linn	Iowa City	IA	52240	H							X	X	X	X	X	X
30	Iowa City Senior Center	28 South Linn	Iowa City	IA	52240	F							X	X	X	X	X	
31	Iowa City Senior Center	28 South Linn	Iowa City	IA	52240	S							X	X	X	X	X	
32	Lone Tree	Box 3372/o City Hall	Lone Tree	IA	52755	C							X	X	X	X	X	
33	Lone Tree	Box 3372/o City Hall	Lone Tree	IA	52755	H							X	X	X	X	X	
34	Marengo Community Center	970 Court Ave	Marengo	IA	52301	C							X	X	X	X	X	
35	Marengo Community Center	970 Court Ave	Marengo	IA	52301	H							X	X	X	X	X	
36	Marengo Community Center	970 Court Ave	Marengo	IA	52301	F							X	X	X	X	X	
37	Marengo Community Center	970 Court Ave	Marengo	IA	52301	S	X	X	X	X	X							
38	Marion Activity Center	600 - 10th Ave	Marion	IA	52302	C							X	X	X	X	X	
39	Mechanicsville Senior Center	102 John Street	Mechanicsville	IA	52306	C							X	X	X	X	X	
40	Mechanicsville Senior Center	102 John Street	Mechanicsville	IA	52306	H							X	X	X	X	X	
41	Millersburg City Hall	461 Washington Street	Millersburg	IA	52308	C							X	X	X		X	
42	Millersburg City Hall	461 Washington Street	Millersburg	IA	52308	H							X	X	X		X	
43	The Monticello Senior Center	211 North Main Street	Monticello	IA	52310	C							X	X	X	X	X	
44	The Monticello Senior Center	211 North Main Street	Monticello	IA	52310	H							X	X	X	X	X	
45	The Monticello Senior Center	211 North Main Street	Monticello	IA	52310	F							X	X	X	X	X	
46	North English Community Center	210 South Main Street PO Box 262	North English	IA	52316	C												
47	North English Community Center	210 South Main Street PO Box 262	North English	IA	52316	H							X	X	X		X	
48	Olin Legion Hall	American Legion Hall	Olin	IA	52320	C							X		X		X	
49	Olin Legion Hall	American Legion Hall	Olin	IA	52320	H							X		X		X	
50	Olin Legion Hall	American Legion Hall	Olin	IA	52320	F							X		X		X	
51	Olin Legion Hall	American Legion Hall	Olin	IA	52320	S												
52	Oxford Junction Senior Center	115 Broadway Street	Oxford Junction	IA	52323	C							X		X		X	

**Attachment 8
Nutrition Services**

	Location					Services (one service per line)	Breakfast					Lunch						
	Name	Street Address	County	City	Zip	Home Delivered(H) Congregate (C) Frozen (F) Shelf Stable(S)	M	T	W	TH	F	S/S	M	T	W	TH	F	S/S
53	Oxford Junction Senior Center	115 Broadway Street	Oxford Junction	IA	52323	H							X		X		X	
54	Oxford Junction Senior Center	115 Broadway Street	Oxford Junction	IA	52323	F							X		X		X	
55	Oxford Junction Senior Center	115 Broadway Street	Oxford Junction	IA	52323	S												
56	Riverside Community Center	PO Box 293	Riverside	IA	52327	C							X	X	X	X	X	
57	Riverside Community Center	PO Box 293	Riverside	IA	52327	H							X	X	X	X	X	
58	SE Linn Community Center	108 South Washington	Lisbon	IA	52253	C							X	X	X	X	X	
59	SE Linn Community Center	108 South Washington	Lisbon	IA	52253	H							X	X	X	X	X	
60	SE Linn Community Center	108 South Washington	Lisbon	IA	52253	F							X	X	X	X	X	
61	Solon Nutrition Site	122 North West Street	Solon	IA	52333	C							X	X	X	X	X	
62	Solon Nutrition Site	Solon United Methodist Church	Solon	IA	52333	H							X	X	X	X	X	
63	Solon Nutrition Site	122 North West Street	Solon	IA	52333	F							X	X	X	X	X	
64	Solon Nutrition Site	Solon United Methodist Church	Solon	IA	52333	S	X	X	X	X	X							
65	Springville Community Center	265 Broadway PO Box 218	Springville	IA	52336	C							X	X	X	X	X	
66	Springville Community Center	265 Broadway PO Box 218	Springville	IA	52336	H							X	X	X	X	X	
67	St. Marks United Methodist Church	4700 Johnson Ave NW	Cedar Rapids	IA	52405	C							X	X	X	X	X	
68	Tipton - Cedar County Senior Citizens	111 Orange Street	Tipton	IA	52772	C							X	X	X	X	X	
69	Tipton - Cedar County Senior Citizens	111 Orange Street	Tipton	IA	52772	H							X	X	X	X	X	
70	Tipton - Cedar County Senior Citizens	111 Orange Street	Tipton	IA	52772	F							X	X	X	X	X	
71	Victor City Hall	707 - 2nd Street	Victor	IA	52347	C							X	X	X	X	X	
72	Victor City Hall	707 - 2nd Street	Victor	IA	52347	H							X	X	X	X	X	
73	Victor City Hall	707 - 2nd Street	Victor	IA	52347	F							X	X	X	X	X	
74	Washington Community Y	121 East Main	Washington	IA	52353	C							X	X	X	X	X	
75	Washington Community Y	121 East Main	Washington	IA	52353	H							X	X	X	X	X	
76	Wellman / Washington County Senior Center	316 - 8th Avenue PO Box 218	Washington	IA	52356	C							x	x	x	x	x	
77	Wellman / Washington County Senior Center	316 - 8th Avenue PO Box 218	Washington	IA	52356	H							x	x	x	x	x	
78	Witwer Senior Center	305 - 2nd Avenue SE	Cedar Rapids	IA	52401	C							x	x	x	x	x	x

**Attachment 8
Nutrition Services**

	Location					Services (one service per line)	Breakfast						Lunch					
	Name	Street Address	County	City	Zip	Home Delivered(H) Congregate (C) Frozen (F) Shelf Stable(S)	M	T	W	TH	F	S/S	M	T	W	TH	F	S/S
79	Wyoming Memorial Hall	Memorial Hall	Wyoming	IA	52362	C							x		x		x	
80	Wyoming Memorial Hall	Memorial Hall	Wyoming	IA	52362	H							x		x		x	
81	Wyoming Memorial Hall	Memorial Hall	Wyoming	IA	52362	F							x		x		x	
82	Wyoming Memorial Hall	Memorial Hall	Wyoming	IA	52362	S							x		x		x	

Instructions are on page 24 of the Area Plan SFY 2014-2015 document.

**Attachment 8
Nutrition Services**

Dinner						
M	T	W	TH	F	S/S	Average Weekly Meals
						250
						15
						85
						185
						10
X	X	X	X	X		1
						120
						97
						24
						18
						4
						1
						21
						6
						70
						221
						6
						29
						80
						26
						5
						60
						1
						40
						1482
						492

Instructions are on page 24 of the Area Plan SFY 2014-2015 document.

**Attachment 8
Nutrition Services**

Dinner						
M	T	W	TH	F	S/S	Average Weekly Meals
						736
						287
						710
						69
						53
						125
						60
						75
						56
						1
						2
						50
						9
						77
						84
						4
						112
						27
						1
						64
						124
						18
						10
						1
X		X		X		1
						6

Instructions are on page 24 of the Area Plan SFY 2014-2015 document.

**Attachment 8
Nutrition Services**

Dinner						
M	T	W	TH	F	S/S	Average Weekly Meals
						9
						1
X		X		X		1
						75
						10
						55
						68
						1
						65
						7
						4
						18
						25
						1
						55
						239
						160
						1
						63
						13
						2
						85
						110
						160
						35
						126

Instructions are on page 24 of the Area Plan SFY 2014-2015 document.

**Attachment 8
Nutrition Services**

Dinner						
M	T	W	TH	F	S/S	Average Weekly Meals
						14
						14
						3
						1

Attachment 9

Contracts with Service Providers of OAA Services listed in 3A-1 Form

Name of Area Agency on Aging: The Heritage Area Agency on Aging

Shirley Rudelmann
Signature of Chair, Governing

Date: 3-28-13
3-27-13

James Crote
Ingrid Wensel
Signature of Executive Director

Date: 3/26/13

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

The signature page is the second sheet of the workbook.

Attachment 9

Contracts with Service Providers of OAA Services listed in 3A-1 Form

Name of Area Agency on Aging: The Heritage Area Agency on Aging										
Name of OAA Service Provided	Service Provider Name	Service Provider Address	Service Provider City	Service Provider State	Service Provider Zip Code	Number of County(s) in which Service is Provided	Contract Period (Month/Year to Month/Year)	Entered into INAPIS System (Yes/No)	Contract Type FP (For Profit) NP (Not-for-Profit) POS (Purchase of Service Provider Contract)	Cost Per Unit of Service
Adult Day Services	Milestones Adult Day Health Se	1725 O Ave. NW / 1080 Cardinal Dr	Cedar Rapids/Mar	Iowa	52405/52302	2 sites serving re	7/2013-6/2015	Yes	NP/POS	\$9.50 hour
Adult Day Services	Lending Hands Adult Day Healt	301 Hwy 1 & 92 North	Washington	Iowa	52353	1	7/2013-6/2015	Yes	NP/POS	\$8.86 hour
Adult Day Services	Pathways Adult Day Health Cer	817 Pepperwood Lane	Iowa City	Iowa	52240	1 site serving res	7/2013-6/2015	Yes	NP/POS	\$10.50 hour
Respite	Aging Services	317 7th Ave. SE Suite 302B	Cedar Rapids	Iowa	52401	3	7/2013-6/2015	Yes	NP/POS	\$7.50 hour
Respite	Milestones Adult Day Health Se	1725 O Ave. NW / 1080 Cardinal Dr	Cedar Rapids/Mar	Iowa	52405/52302	2 sites serving re	7/2013-6/2015	Yes	NP/POS	\$9.50 hour
Respite	Lending Hands Adult Day Healt	301 Hwy 1 & 92 North	Washington	Iowa	52353	1	7/2013-6/2015	Yes	NP/POS	\$8.86 hour
Respite	Cedar County Public Health	400 Cedar Street	Tipton	Iowa	52772	1	7/2013-6/2015	Yes	NP/POS	\$20.21 hour
Respite	Pathways Adult Day Health Cer	817 Pepperwood Lane	Iowa City	Iowa	52240	1 site serving res	7/2013-6/2015	Yes	NP/POS	\$10.50 hour
Respite	Volunteer Services of Cedar Co	401 West 9th Street, PO Box 307	Tipton	Iowa	52772	1	7/2013-6/2015	Yes	NP/POS	\$9.27 hour
Chore	Aging Services	317 7th Ave. SE Suite 302B	Cedar Rapids	Iowa	52401	3	7/2013-6/2015	Yes	NP/POS	\$14.70 hour
Assessment & Interventio	Aging Services	317 7th Ave. SE Suite 302B	Cedar Rapids	Iowa	52401	1	7/2013-6/2015	Yes	NP	\$56.60 hour
Assessment & Interventio	Elder Services	1556 South 1st Ave., Suite A	Iowa City	Iowa	52240	1	7/2013-6/2015	Yes	NP	\$125.60 hour
Case Management	Aging Services	317 7th Ave. SE Suite 302B	Cedar Rapids	Iowa	52401	3	7/2013-6/2015	Yes	NP	\$31.94 hour
Information & Assistance	First Call for Help Iowa United	317 7th Ave. SE Suite 401	Cedar Rapids	Iowa	52401	7	7/2013-6/2015	No	NP	\$3.43 contact
Legal Assistance	Martha Quint	118 3rd Ave. SE Suite 600	Cedar Rapids	Iowa	52401	7	7/2013-6/2015	No	FP	\$46.00 hour
Legal Education	Martha Quint	118 3rd Ave. SE Suite 600	Cedar Rapids	Iowa	52401	7	7/2013-6/2015	No	FP	\$12 consumer
Assisted Transportation	Benton County Volunteer Prog	1309 5th Avenue	Belle Plaine	Iowa	52208	1	7/2013-6/2015	Yes	NP/POS	\$0.50 mile
Assisted Transportation	RSVP of Jones County (United	317 7th Avenue SE Suite 401	Cedar Rapids	Iowa	52401	1	7/2013-6/2015	Yes	NP/POS	\$0.485 mile
Assisted Transportation	Volunteer Services of Cedar Co	401 West 9th Street, PO Box 307	Tipton	Iowa	52772	1	7/2013-6/2015	Yes	NP/POS	\$0.50 mile
Mental Health Outreach	Aging Services	317 7th Ave. SE Suite 302B	Cedar Rapids	Iowa	52401	3	7/2013-6/2015	Yes	NP/POS	\$132.29 hour
Transportation	Aging Services	317 7th Ave. SE Suite 302B	Cedar Rapids	Iowa	52401	1	7/2013-6/2015	No	NP/POS	\$0.51 mile
Transportation	Southeast Linn Community Cer	108 South Washington St.	Lisbon	Iowa	52253	1	7/2013-6/2015	No	NP/POS	\$0.48 mile
Chore	Caring Hands & More, LLC.	1556 South 1st Ave., Suite B	Iowa City	Iowa	52240	1	7/2013-6/2015	Yes	FP/POS	\$16.00 hour
Respite	Caring Hands & More, LLC.	1556 South 1st Ave., Suite B	Iowa City	Iowa	52240	1	7/2013-6/2015	Yes	FP/POS	\$15.00 hour
Nutrition	Aging Services, Inc.	1725 O Ave. NW	Cedar Rapids	Iowa	52405	1	7/2013-6/2015	Yes	NP/POS	\$3.84 meal

Name of OAA Service Provided	Service Provider Name	Service Provider Address	Service Provider City	Service Provider State	Service Provider Zip Code	Number of County(s) in which Service is Provided	Contract Period (Month/Year to Month/Year)	Entered into INAPIS System (Yes/No)	Contract Type FP (For Profit) NP (Not-for-Profit) POS (Purchase of Service Provider Contract)	Cost Per Unit of Service
Nutrition	Cedar County Senior Citizens	111 Orange Street	Tipton	Iowa	52772	1	7/2013-6/2015	Yes	NP/POS	\$4.16 meal
Nutrition	City of Wellman	316 8th Avenue PO Box 218	Wellman	Iowa	52356	1	7/2013-6/2015	Yes	NP/POS	\$4.46 meal
Nutrition	Elder Services, Inc.	28 South Linn	Iowa City	Iowa	52240	5	7/2013-6/2015	Yes	NP/POS	\$4.32 meal
Nutrition	Horizons - A Family Service Alliance	819 5th Street SE	Cedar Rapids	Iowa	52401	3	7/2013-6/2015	Yes	NP/POS	\$4.50 meal
Nutrition	Jones County Board of Supervisors	112 North Ford Street	Anamosa	Iowa	52205	1	7/2013-6/2015	Yes	NP/POS	\$4.50 meal
Nutrition Counseling	Aging Services, Inc.	317 7th Ave. SE Suite 302B	Cedar Rapids	Iowa	52401	7	7/2013-6/2015	Yes	NP/POS	\$31.94 hour

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

Attachment 10
Request for Direct Service Waiver (DSW)

1. Service Selection.

Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

- a. The area agency does not request a Direct Service Waiver in SFY 2014.

If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

2. Waiver Request. A waiver is required once during the SFY 2014-2015 area plan period for each service provided directly by the area agency if the waiver is maintained for the entire two-year period of the area plan. Complete a form for each service.

If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Evidence-Based Health Activities
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an adequate supply of such service.
- d. Such service is directly related to the administrative function of the Area Agency on Aging.
- e. The service is provided more economically, and with comparable quality by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

Heritage has strong, well known, Evidenced Based Health Activities & Promotion programs. Two nationally recognized programs are offered through Heritage, Chronic Disease Self-Management Program (CDSMP) and Matter of Balance (MOB). These two programs are the highest-level criteria to meet the fiscal year 2012 requirements for Title IIID funding activities. Continued implementation of these programs involves several strategies. Program implementation is through the full-time position of Program and Health Promotions Coordinator. This position coordinates all program activity, reporting, participant and volunteer leader recruitment, partner communication and seeking continued program sustainability. This position is a Master Trainer for CDSMP and MOB. Also, the Heritage Nutrition and Healthy Living Program Coordinator is a Master Trainer for MOB and the Heritage Associate Director is the only Area Agency on Aging employee in Iowa to be a certified National T-Trainer for CDSMP. Staff provides ongoing education/trainings to community participants as well as for volunteer coaches and leaders. Community partnership is key to successful program implementation. Mercy Medical Center in Cedar Rapids continues to sustain the CDSMP region wide through financial and staff support. Mercy coordinates most aspects of the CDSMP with Heritage. This unique partnership was key in landing Heritage a spot in a human subject's research project with Stanford University.

Through, the SureSteps Program, funded by Wellmark Foundation, Heritage was able to train MOB coaches in Johnson County and offer classes in community settings and senior centers.

On a smaller scale, Heritage was recently invited to participate in a study at the University of Iowa, Fred Wolinsky and his colleagues evaluated two different ways of delivering a cognitive training video game named Road Tour.

Heritage partnered with the Cedar County Senior Center to recruit participants, had seven participants finish and complete the project, all had improvement over the ten hours of doing the road course, and said they would be interested in doing it again. Unique to Heritage, Rockwell Collins Retired Volunteers participated via home computers, with eight of the volunteers successfully completing the program.

Heritage continues to be the evidenced based data collector and in-puter for several other Area Agencies on Aging in Iowa, as well as public health departments in and out of the Heritage region.

Program implementation next steps include investigating offering CDSMP online to caregivers, and pursuing Healthy Ideas (Identifying Depression, Empowering Activities for Seniors). Also, the Heritage Resources & Caregiver Support Program Coordinator is scheduled for training in April of 2013 to become a facilitator of the Powerful Tools for Caregivers program. Part of the planning process is identifying potential partners and forming the right partnerships to ensure the success and sustainability of Heritage programming.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. Public Hearing Documentation: Provide documentation of the public hearing.

The Heritage Area Agency on Aging

Name of Area Agency on Aging (Type)

Shirley Gadelman

Signature of Chair, Governing Body

James Choate

3-28-13

Date ~~3-27-13~~

Ingrid Wenzel

Signature of Executive Director

3/26/13

Date

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Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Health Promotion
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an adequate supply of such service.
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- e. The service is provided **more economically, and with comparable quality** by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

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Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. **Public Hearing Documentation:** Provide documentation of the public hearing.

The Heritage Area Agency on Aging

Name of Area Agency on Aging (Type)

Shirley Goodhewer
Signature of Chair, Governing Body

3-28-13

Date 3/27/13

Ingrid Wensel
Signature of Executive Director

3/25/13

Date

Sasser, Shan [IDA]

From: Kellie Elliott-Kapparos <Kellie.Elliott-Kapparos@kirkwood.edu>
Sent: Friday, April 12, 2013 2:05 PM
To: Ingrid Wensel; Sasser, Shan [IDA]
Cc: Majeski, Brian [IDA]; Jill Gleason
Subject: RE: Area Plan Info

Follow Up Flag: Follow up
Flag Status: Flagged

Shan,

Jill Gleason and I just left you a message. We want to give you a complete response in a timely manner, so if you need more than this, please just let us know.

Area Plan Information Response from email dated 4/10/13:

When completing the Direct Service Waiver forms for Evidenced Based Health Activities and Health Promotion taxonomy definitions, Heritage had considered the justification incomplete without explaining the coordinated efforts and comprehensive programing that relates to both taxonomy definition activities. Looking back, we understand why this would seem a bit confusing so this email is with the intent to clarify justifications in a more specific rationale.

Justification for Evidenced Based Health Activities

Heritage will continue to use two nationally recognized programs to offer Evidence Based Health Activities. These two programs are at the highest level criteria to meet the requirements for Title IIID funding activities. These programs include Chronic Disease Self-Management (CDSMP) and Matter of Balance. Mercy Medical Center in Cedar Rapids continues to support and coordinate the CDSMP region wide in partnership with Heritage. Lastly, Heritage staff is attending training to become a certified leader for Powerful Tools for Caregivers Program this month.

Justification for Health Promotion

Evidenced Based Health Activities are listed under this taxonomy definition. Additionally, Heritage regional senior congregate dining sites often offer health screenings, educational speakers (Heritage staff and/or other community partners), flu shot clinics and other health promotion activities. We also provide health information through all of our partners, such as Mercy Medical Center, and in more casual formats like newsletters and educational pieces.

Thank you,
Kellie

Kellie Elliott-Kapparos

Operations Director
The Heritage Area Agency on Aging
Kirkwood Community College
PO Box 2068
6301 Kirkwood Blvd. SW
Cedar Rapids, Iowa 52406
(319) 398-5559 or (800) 332-5934
Fax (319) 398-5533

www.involvementonline.org

To connect to Iowa's aging and disability resources: www.LifeLongLinks.org

The Mission of the Iowa Department on Aging is to develop a comprehensive, coordinated and cost-effective system of long term living and community support services that help individuals maintain health and independence in their homes and communities.

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Privileged/Confidential Information may be contained in this message. If you are not the addressee indicated in this message (or responsible for delivery of the message to such person), you may not copy or deliver this message to anyone. In such case, you should destroy this message and kindly notify the sender by reply email. Please advise immediately if you or your employer do not consent to Internet email for messages of this kind. Opinions, conclusions and other information in this message that do not relate to the official business of my organization shall be understood as neither given nor endorsed by it.

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

Attachment 10
Request for Direct Service Waiver (DSW)

1. Service Selection.

Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

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If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

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If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Money Management
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an **adequate supply** of such service.
- d. Such service is directly related to the **administrative function** of the Area Agency on Aging.
- e. The service is provided **more economically, and with comparable quality** by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

The Heritage Area Agency on Aging's strategy for implementation of the service of Money Management is to continue to use direct service dollars that are designated for use by the Care Connections Team. Members of the Care Connections Team include Case Managers, Aging and Disability Resource Center Options Counselors and the Resources and Caregiver Support Program Coordinator. In regards to the Money Management program, direct service dollars are utilized for fees associated with Conservatorships since there aren't many people out there that will act as Conservators. Heritage's strategy for implementation is to continue the partnership with the few local individuals that have been serving Heritage's clients in this capacity for the last several years. This service and any resources directed to it will supplement Heritage's CDBG Money Management program and the AARP Money Management Program to make the assistance with finances available in all counties of the Planning and Service Area.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. Public Hearing Documentation: Provide documentation of the public hearing.

The Heritage Area Agency on Aging
Name of Area Agency on Aging (Type)

HAAA-PSA4-SFY 2014-2015

71

Shirley Goodmann
Signature of Chair, Governing Body

3-28-13

Date *3-27-13*

Ingrid Wenzel
Signature of Executive Director

3/25/13

Date

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

Attachment 10
Request for Direct Service Waiver (DSW)

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If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Options Counseling
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an **adequate supply** of such service.
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- e. The service is provided **more economically, and with comparable quality** by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

Options Counseling (OC) is a key access service to The Heritage Area Agency on Aging. Heritage's Aging and Disability Resource Center (ADRC) utilizes several trained Options Counselors internally and through an external partner. A mandate to being a fully functional ADRC is offering the services of trained Options Counselors. This service is delivered through the Heritage region as the single point of entry to long term services and supports for all people, all payers. Since Heritage operated the first ADRC in the State, Heritage has been fundamental in building the benchmark for state and federal standards related to defining Options Counseling. Heritage ADRC Options Counselor's meet the draft state qualifications, while also mandating that all Options Counselors be CIRS-A certified, SHIP trained and have dependent adult abuse training. Heritage OC's provide consumer driven decision support in key decision-making time, and provides referrals and linkages to care coordinated services. They build action plans based on the client's needs, values and preferences. Options Counselors are also vital to providing education and outreach to consumers, caregivers, area agencies, organizations, and advocacy groups. Because the service of Options Counselors is the link to building a seamless service delivery system with no wrong door, Heritage will continue to develop this implementation strategy.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. Public Hearing Documentation: Provide documentation of the public hearing.

The Heritage Area Agency on Aging

Name of Area Agency on Aging (Type)

Shirley Gadsdman

Signature of Chair, Governing Body

3-28-13

Date 3-27-13

Ingrid Wensel

Signature of Executive Director

3/25/13

Date

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

**Attachment 10
Request for Direct Service Waiver (DSW)**

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Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

- a. The area agency does not request a Direct Service Waiver in SFY 2014.

If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

2. Waiver Request. A waiver is required once during the SFY 2014-2015 area plan period for each service provided directly by the area agency if the waiver is maintained for the entire two-year period of the area plan. Complete a form for each service.

If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:

Public Information
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an **adequate supply** of such service.
- d. Such service is directly related to the **administrative function** of the Area Agency on Aging.
- e. The service is provided **more economically, and with comparable quality** by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

The Heritage Area Agency on Aging's strategy for implementation of the service of Public Information will be the continuation of our national and state award winning monthly television program; The Involvement Report. A partnership between Heritage, Kirkwood Community College Media Services, and Kirkwood Television, The Involvement Report brings information on a wide variety of issues related to aging and disability to its viewers. Topics that have been featured on the program include elder abuse intervention and prevention, caregiver wellness, nutrition services for older adults, the Heritage Aging and Disability Resource Center, case management, and respite care. The monthly program is re-aired at least 48 times per month on the Kirkwood Channel and also is aired on other area cable stations.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. Public Hearing Documentation: Provide documentation of the public hearing.

The Heritage Area Agency on Aging
Name of Area Agency on Aging (Type)

Shirley Gadelmann
Signature of Chair, Governing Body

3-28-13
Date 3-27-13

Ingrid Wensel
Signature of Executive Director

3/25/13

Date

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

Attachment 10
Request for Direct Service Waiver (DSW)

1. Service Selection.

Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

- a. The area agency does not request a Direct Service Waiver in SFY 2014.

If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

2. Waiver Request. A waiver is required once during the SFY 2014-2015 area plan period for each service provided directly by the area agency if the waiver is maintained for the entire two-year period of the area plan. Complete a form for each service.

If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:

Training/Education

(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an adequate supply of such service.
- d. Such service is directly related to the administrative function of the Area Agency on Aging.
- e. The service is provided more economically, and with comparable quality by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

The Heritage Area Agency on Aging's strategy for implementation of the service of Training/Education is expansive throughout the Heritage region and is provided by numerous Heritage staff. Training/Education opportunities provided by Heritage currently includes and will continue as part of the future strategy to consist of caregiver education, Caregiver Wellness Day, formal presentations to the public on positive aging, health promotion, education and wellness, how to access long term services and supports, available benefits through Medicare and Medicaid. Training/Education is provided informally as well through presenting knowledge and skills training via web-based instruction and caregiver support groups. This includes educating providers about needs, trends and consumer unmet needs.

The Heritage Area Agency on Aging on Aging's Care Connection Director has provided Training and Education to the Case Management for Frail Elderly (CMPFE) team through monthly Regional Case Management Team Meetings for six years. Heritage will continue providing this service in the monthly meeting format. Case Managers are trained on a variety of topics including program policies and procedures, Iowa Administrative Rules, program developments and trends, and more. If topics extend beyond the CMPFE team, staff from the Aging and Disability Resource Center, Elder Abuse Intervention program, and Information and Assistance and Caregiver Support programs are also invited to attend.

Heritage staff members will continue to represent the agency when invited to speak to college classes, civic groups, provider groups, and more. Topics will include general agency information, disease specific information, elder abuse, Medicaid, Medicare, available long term services and supports, nutrition, caregiver information, and more.

The Case Management Coordinator will continue to host a monthly informational session allowing local providers of services to sit down with Case Managers and staff from the Aging and Disability Resource Center, Elder Abuse Intervention program, and Information and Assistance and Caregiver Support programs. The provider is given the opportunity to meet the people with whom they might share clients and to educate them on their products and services.

Case Managers and other Heritage staff will continue offer Training and Education to students from nearby colleges and universities. Heritage will host practicum students from Kirkwood Community College, The University of Iowa, Mount Mercy University, The University of Northern Iowa, and other nearby schools. Heritage partners with Kirkwood Community College as a clinical rotation sight for nursing students in the "Community Nursing" portion of their rotation. Nursing students shadow a Case Manager for two days. One day the student shadows a Case Manager working in rural county and the other day they shadow a Case Manager working in a more urban setting. Additionally, Heritage offers several practicum placements for Social Work and Human Services students. Heritage will continue with the current implementation strategy as it has proven to be well received and quite successful.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. **Public Hearing Documentation:** Provide documentation of the public hearing.

The Heritage Area Agency on Aging

Name of Area Agency on Aging (Type)

<u>Shirley G. Adelman</u>	<u>3-28-13</u>
Signature of Chair, Governing Body	Date
<u>James Choate</u>	<u>3-27-13</u>
	Date
<u>Ingrid Wenzel</u>	<u>3/25/13</u>
Signature of Executive Director	Date

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

Attachment 10
Request for Direct Service Waiver (DSW)

1. Service Selection.

Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

- a. The area agency does not request a Direct Service Waiver in SFY 2014.

If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

2. Waiver Request. A waiver is required once during the SFY 2014-2015 area plan period for each service provided directly by the area agency if the waiver is maintained for the entire two-year period of the area plan. Complete a form for each service.

If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Access Assistance (Title III E)
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an **adequate supply** of such service.
- d. Such service is directly related to the **administrative function** of the Area Agency on Aging.
- e. The service is provided **more economically, and with comparable quality** by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

The Heritage Area Agency on Aging's strategy for implementation of the service of Family Caregiver Access Assistance is comprehensive and serves as a "no wrong door" access point to the Heritage continuum of care.

All appropriate efforts are made to provide Family Caregiver Access Assistance callers/visitors in the Heritage region with current information on opportunities and services available based on the consumer's need and to ensure the consumer is assisted in a timely manner with the most helpful, up to date information available.

The following internal standards are and will be practiced to implement service delivery strategy:

- Identified staff members will be AIRS certified and follow all principles and guidelines
- State standards shall be followed as issued
- All calls will be responded to within one business day
- All callers will receive follow up contact as appropriate and welcomed
- All Heritage staff are expected to be able to provide basic information on the Aging Network and services available in our region. All staff are not expected to be experts in I and A / Caregiving issues, however, they do need to be able to provide excellent customer service and ensure that any consumer is referred to the appropriate staff member/program for follow up.
- All Information and Assistance provided will be sufficient to ensure all family caregivers will have convenient access
- Service will be provided in an appropriate mode to ensure full service to individuals with Limited English Proficiency, hearing and/or sight impairments

In addition, the Heritage Resources and Caregiver Support Program Coordinator is experienced and knowledgeable in the field of aging, caregiving issues and Aging and Disability Resource Center referral processes. This staff person's duties include providing information, assesses issues and capacities, linking individuals to opportunities and supports, and providing follow up as appropriate. Caregivers in the Heritage region expect and will continue to experience a professional willing to listen to their request or concern, ask questions and be provided with information personalized to their needs when they contact Heritage. Assistance in gaining access to such supportive services offered by Heritage can be obtained by calling Heritage at 319-398-5559 or 1-800-332-5934. Additionally, an Information and Assistance helpline is available by calling toll-free, nationwide at 1-866-432-4324. In person office appointments are also available. They can also email Heritage at heritage@kirkwood.edu.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. **Public Hearing Documentation:** Provide documentation of the public hearing.

The Heritage Area Agency on Aging

Name of Area Agency on Aging (Type)

<u>Shirley Gooden</u>	<u>3-28-13</u>
Signature of Chair, Governing Body	Date
<u>Ingrid Wenzel</u>	<u>3/25/13</u>
Signature of Executive Director	Date

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

Attachment 10
Request for Direct Service Waiver (DSW)

1. Service Selection.

Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

- a. The area agency does not request a Direct Service Waiver in SFY 2014.

If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

2. Waiver Request. A waiver is required once during the SFY 2014-2015 area plan period for each service provided directly by the area agency if the waiver is maintained for the entire two-year period of the area plan. Complete a form for each service.

If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Cash and Counseling (Title III E)
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an **adequate supply** of such service.
- d. Such service is directly related to the **administrative function** of the Area Agency on Aging.
- e. The service is provided **more economically, and with comparable quality** by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

The Heritage Area Agency on Aging's strategy for implementation of the service of Cash and Counseling for supplemental services is to empower the Heritage Resources and Caregiver Support Program Coordinator to offer such services to family caregivers identified as caring for a particularly high risk older adult(s), experiencing an extreme level of caregiver stress, or other circumstance that would put the care recipient at undue risk for premature institutionalization. Services would be funded by Heritage and in accordance with an annual budget. The Heritage Resources and Caregiver Support Program Coordinator will use their experience, knowledgeable in the field of aging and caregiver issues, and best practices from other area agencies on aging to develop a measurable screening tool to qualify individuals to access supplemental services by July 1, 2013. This would be done in conjunction with the other programs within the Heritage care continuum and in compliance with all applicable rules and regulations. Designated direct service dollars for the Cash and Counseling for supplemental services will be accessed via Heritage's Care Connections Team. Members of the Care Connections Team include Case Managers, Aging and Disability Resource Center Options Counselors and the Resources and Caregiver Support Program Coordinator. Assistance in obtaining such supplemental services from Heritage will be accessible by calling Heritage at 319-398-5559 or 1-800-332-5934. In person office appointments are also available. They can also email Heritage at heritage@kirkwood.edu.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. **Public Hearing Documentation:** Provide documentation of the public hearing.

The Heritage Area Agency on Aging
Name of Area Agency on Aging (Type)

<u>Shirley Headelmann</u> Signature of Chair, Governing Body	<u>James Choate</u>	<u>3-28-13</u> Date 3-27-13
<u>Ingrid Wensel</u> Signature of Executive Director		<u>3/28/13</u> Date

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

Attachment 10
Request for Direct Service Waiver (DSW)

1. Service Selection.

Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

- a. The area agency does not request a Direct Service Waiver in SFY 2014.

If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

2. Waiver Request. A waiver is required once during the SFY 2014-2015 area plan period for each service provided directly by the area agency if the waiver is maintained for the entire two-year period of the area plan. Complete a form for each service.

If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Counseling (Title III E)
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an adequate supply of such service.
- d. Such service is directly related to the administrative function of the Area Agency on Aging.
- e. The service is provided more economically, and with comparable quality by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

The Heritage Area Agency on Aging's strategy for implementation of the service of Counseling includes expansion and better reporting from Heritage based upon pending rule changes. Heritage currently performs Counseling as described in Attachment 9 of the RFA submitted, but has not reported "caregiver counseling" for a period of time based upon Heritage's interpretation of rules that imply that such service must be performed by a licensed mental health professional.

Heritage offers and will expand emotional support for caregivers in a variety of means. Heritage staff, typically the Resources and Caregiver Support Program Coordinator, provides information, educational materials and guidance to caregivers to assist them in making decisions and problem solving. Heritage will also begin holding support sessions for caregivers in addition to educational sessions and the Caregiver Wellness Day, such as a "Facebook Friday" session for caregivers on Facebook. This is an opportunity for a new demographic of family caregivers to have a real time, interactive, one-on-one, social media sessions with a trained Heritage staff person to answer questions and to provide a new kind of emotional support and online community. The reach of this program session is limitless. Additionally, Heritage is in the process of establishing a support group directed towards working caregivers to take place on a monthly basis with the possibility of increasing frequency as warranted.

Heritage will be actively involved in the implementation of any new rule changes with the Iowa Department on Aging and identified best practices to work in collaboration with state stakeholders to improve access to services and consistency in service delivery. Based on rules and taxonomies, Heritage can better report and expand the emotional Counseling services offered to family caregivers.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. **Public Hearing Documentation:** Provide documentation of the public hearing.

The Heritage Area Agency on Aging

Name of Area Agency on Aging (Type)

<u>Shirley Goodmann</u>	<u>3-28-13</u>
Signature of Chair, Governing Body	Date 3-27-13
<u>Ingrid Wensel</u>	<u>3/25/13</u>
Signature of Executive Director	Date

Instructions are on page 25 of the Area Plan SFY 2014-2015 document.

**Attachment 10
Request for Direct Service Waiver (DSW)**

1. Service Selection.

Click the box to insert an "x" to indicate the area agency is not requesting a Direct Service Waiver in SFY 2014.

- a. The area agency does not request a Direct Service Waiver in SFY 2014.

If option "a" is selected by the area agency, it is not necessary to complete the remaining portion of the form.

2. Waiver Request. A waiver is required once during the SFY 2014-2015 area plan period for each service provided directly by the area agency if the waiver is maintained for the entire two-year period of the area plan. Complete a form for each service.

If the area agency has contracted with a provider for a specific service and the area agency provides that same service directly as well, a waiver request is required for the service.

Click the box to insert an "x" to indicate the area agency is seeking a request to provide a direct service.

- b. The area agency requests to provide a direct service in SFY 2014. The service for which the area agency seeks a Direct Service Waiver is:
Information Services (Title III E)
(Type Service Name)

3. Select the basis on which the waiver is requested. (More than one box may be selected.)

Use the left mouse to double click on the box to open the box and insert an "x" to indicate the basis on which the area agency makes its request.

- c. Provision of such service by the Area Agency on Aging is necessary to assure an **adequate supply** of such service.
- d. Such service is directly related to the **administrative function** of the Area Agency on Aging.
- e. The service is provided **more economically, and with comparable quality** by the Area Agency on Aging. Refer to the Instructions for details about how to complete "e".

4. Justification for Direct Service Waiver: Provide a detailed justification for the waiver request.

The Heritage Area Agency on Aging's strategy for implementation of the service described as Information Services will be coordinated through caregiver support and education opportunities. These programs have traditionally addressed the need for quality Information Services on available resources and supports to individuals who provide care of older adults, both professional and family caregivers.

Heritage will offer approximately twelve Caregiver Educational Sessions a year. These presentations will cover many topics specific to the needs of family caregivers, such as legal issues, stress reduction techniques, available resources and much more.

Also, Heritage will continue to hold an annual Caregiver Wellness Day that is a wonderful event for family caregivers offering information, national speakers and respite care. Heritage's strategy also includes increased articles and informational pieces on Heritage's online publication, The Involvement Magazine, and more education distributed through social media, such as Facebook postings of articles or links as general information and not counseling.

Please reference Attachment 17 for Public Hearing Documentation for the Area Plan and Direct Service Waiver.

5. Public Hearing Documentation: Provide documentation of the public hearing.

The Heritage Area Agency on Aging
Name of Area Agency on Aging (Type)

Shirley Gaddlman 3-28-13
Signature of Chair, Governing Body James Choate Date 3-27-13
Ingrid Wensel 3/25/13
Signature of Executive Director Date

Instructions are on page 26 of the Area Plan SFY 2014-2015 document.

Attachment 12
Compliance with Assurances and General Provisions

The Area Agency on Aging hereby assures compliance, on behalf of the area agency and 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 Code Chapter 8F, Government Accountability-Service Contracts, Contractor Certification and Reporting
- Iowa Administrative Code 17, Department on Aging

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 2014 and 2015 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.

By signing below, the Chair of the Governing Body, and the Executive Director confirm that he or she has 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 SFY2014-2015 Area Plan to the Iowa Department on Aging for approval.

The Heritage Area Agency on Aging (separate organizational unit within a multi-purpose agency)

Name of Area Agency on Aging (Type)

Shirley Rudolphmann
Signature of Area Agency Chair, Governing Body

3-28-13
Date Signed 3-27-13

Ingrid Wensel
Signature of Area Agency Executive Director

3/25/13
Date Signed

Attachment 13
Older Americans Act Assurances (as Amended 2006)
38 Sec. 306 OLDER AMERICANS ACT OF 1965

Assurances

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;

The governing body of The Heritage Area Agency on Aging (name of area agency) has reviewed and approved these Assurances for the SFY 2014-SFY 2015 Area Plan on Aging.

Shirley Goodman
Signature of Chair, Governing Body

3-28-13
Date Signed 3-27-13

Ingrid Wensel
Signature of Executive Director

3/25/13
Date Signed

Instructions are on page 27 of the Area Plan SFY 2014-2015 document.

Attachment 14
Assurance of Compliance with Minority Impact Statement

Iowa Code, Section 8.11. All grant applications submitted to the State of Iowa due January 1, 2009 and forward, shall include a Minority Impact Statement. This is the State's mechanism to require grant applicants to consider the potential impact of the grant project's proposed programs or policies on minority groups.

Please choose the statement(s) that pertains to this grant application. Complete all the information requested for the chosen statement(s).

- Statement One:** The proposed grant projects, programs or policies could have a disproportionate or unique positive impact on minority persons.

Describe the positive impact expected from this project below.

Indicate which group below is impacted by typing an "X" before the group's name.

- Women
- Persons with a disability
- Blacks
- Latinos
- Asians
- Pacific Islanders
- American Indians
- Alaskan Native Americans
- Other

- Statement Two:** The proposed grant projects, programs or policies could have a disproportionate or unique negative impact on minority persons.

Describe the negative impact expected from this project below.

Present the rationale for the existence of the proposed program or policy.

Provide evidence of consultation of representatives of the minority groups impacted.

Indicate which group is impacted by typing an "X" before the group's name.

- Women
- Persons with a disability
- Blacks
- Latinos
- Asians
- Pacific Islanders
- American Indians
- Alaskan Native Americans
- Other

- Statement Three:** The proposed grant project programs or policies are not expected to have a disproportionate or unique impact on minority persons.

Present the rationale for determining no impact.

The PSA 4 has a low minority population. The Heritage Area Agency on Aging's mission statement specifies that the agency services the needs of all older adults, people with disabilities, caregivers and their families through planning, funding and advocating. However, the agency does follow policy in relation to preference as follows:

Policy Statement: The Heritage Area Agency on Aging will give preference to provide service to older individuals with the greatest economic need and older individuals with greatest social need, with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency and older individuals residing in rural areas, in the provision of services under the area plan as provided in Iowa Code and in the Older Americans Act.

This is accomplished through procedures including, but not limited to, giving preference to subcontractors who have demonstrated capacity to reach those with low incomes, minority races or ethnic groups, and those residing in rural areas. Heritage also includes narrative concerning the ability to reach target populations in the RFP (request for proposal) funding application completed by entities requesting funding from Heritage. Contractual language is included in the official contracts with Heritage subcontractors ensuring that these entities are providing services under the area plan as required. This topic is also part of the annual contract review with subcontractors.

FY'2014 Area Plan Update

I certify that the above information is complete and correct to the best of my knowledge.

The Heritage Area Agency on Aging (separate organizational unit within a multi-purpose agency)

Name of Area Agency on Aging (Type)

Shirley Leadman 3-28-13
Signature of Chair, Governing Body Date

James Choate 3-27-13
Date

Ingrid Wenzel 3/25/13
Signature of Executive Director Date

Definitions

"Minority persons", as defined in Iowa Code Section 8.11, mean individuals who are women, persons with a disability, Blacks, Latinos, Asians or Pacific Islanders, American Indians, and Alaskan Native Americans.

"Disability", as defined in Iowa Code Section 15.102, Subsection 5, paragraph "b", subparagraph (1):B. as used in this subsection means:

- (1) **"Disability"** with respect to an individual, a physical or mental impairment that substantially limits one or more of the major life activities of the individual, a record of physical or mental impairment that substantially limits one or more of the major life activities of the individual, or being regarded as an individual with a physical or mental impairment that substantially limits one or more of the major life activities of the individual.

"State agency", as defined in Iowa Code Section 8.11, means a department, board, bureau, commission, or other agency or authority of the State of Iowa.

Instructions are on page 27 of the Area Plan SFY 2014-2015 document.

Attachment 15
Performance Measure 1: Percent of Projected 3A-1 Consumers Served and
Percent of Projected 3A-1 Units of Service Provided

NARRATIVE REPORT

Area Plan Goal: Enable Iowans 60+ to remain in their homes with a high quality of life for as long as they choose to do so through the provision of home and long-term living and community supports.

Output: The number of projected 3A-1 consumers served and the number of 3A-1 units of service provided for each mandatory service.

Measure:

At least 90% of projected 3A-1 consumers receive the mandatory service(s).

At least 90% of projected 3A-1 units of service are provided to consumers for the mandatory service(s).

Outcome: Iowans 60+ have the ability to remain in their homes with a high quality of life for as long as they choose to do so.

Activities/ Events:

Information and Assistance/Caregiver Activities/Events: The Heritage Area Agency on Aging's service strategy of Information and Assistance is comprehensive and serves as a "no wrong door" access point to the Heritage continuum of care. Heritage believes that this access is critical and must be available to individuals 24 hours a day, seven days a week. To meet this high of a standard and fully implement this strategy, Heritage's activities include internal and external access points. All appropriate efforts are made to provide Information and Assistance callers/visitors and Family Caregivers in the Heritage region with current information on opportunities and services available based on the consumer's need and to ensure the consumer is assisted in a timely manner with the most helpful, up to date information available. The following internal standards are and will be practiced to implement service delivery strategy: Identified staff members will be AIRS certified and follow all principles and guidelines; state standards shall be followed as issued (all calls will be responded to within one business day, all callers will receive follow up contact as appropriate and welcomed, all Heritage staff are expected to be able to provide basic information on the Aging Network and services available in our region, all staff are not expected to be experts in I and A / Caregiving issues, however, they do need to be able to provide excellent customer service and ensure that any consumer is referred to the appropriate staff member/program for follow up, all Information and Assistance and Family Caregiver Support provided will be sufficient to ensure all older adults will have convenient access, service will be provided in an appropriate mode to ensure full service to individuals with Limited English Proficiency, hearing and/or sight impairments. The Heritage Area Agency on Aging's Family Caregiver Program is in the process of modernizing to better meet the needs of the changing demographics and challenges of family caregivers. Heritage will begin to increase support available in new ways, such as Facebook in addition to educational sessions and the Caregiver Wellness Day. This is an opportunity for a new demographic of family caregivers to have a real time, interactive, social media sessions with a trained Heritage staff person to answer questions and to provide a new kind of emotional support and online community. The reach of this program session is limitless. Additionally, Heritage will offer approximately twelve Caregiver Educational Sessions a year. These presentations will cover many topics specific to the needs of family caregivers. Topics that are currently under development by the newly hired Resources and Caregiver Support Program Coordinator are: The Sandwich Generation – Juggling Children, Career and Caregiving; The Parent Trap – The Caregiving Guilt Trip; Caregiving Stress; There's No Place Like Home; Caregiving 2.0; Caregiving Matchmakers; Far and Away; The Care Conversation; You are not alone – Accessing Resources and Rallying Support; End of Life Care; Legal Matters – What You Need to Know; Health Care Coverage – Learn About Medicare/Medicaid/Waivers, and The Pursuit of Caregiving Happiness – Me Time Monday. In addition to the potential topics above, the Resources and Caregiver Support Program Coordinator is scheduled to attend training to become a group leader for the Powerful Tools for Caregivers program. Heritage is also serving as a supporting sponsor of the partnership with Iowa State University to establish a community planning group to coordinate these

classes in Linn county. Also, Heritage will continue to hold an annual Caregiver Wellness Day that is a wonderful event for family caregivers offering information, national speakers and respite care.

Case Management Activities/Events: HAAA on Aging's Care Connection Director provides training and education to the Case Management for Frail Elderly (CMPFE) team through monthly Regional Case Management Team Meetings. HAAA will continue providing this service in the monthly meeting format. Case Managers are trained on a variety of topics including program policies and procedures, Iowa Administrative Rules, program developments and trends, and more. If topics extend beyond the CMPFE team, staff from the Aging and Disability Resource Center, Elder Abuse Intervention program, and Information and Assistance and Caregiver Support programs are also invited to attend. HAAA staff members will continue to represent the agency when invited to speak to college classes, civic groups, provider groups, and more. Topics will include general agency information, disease specific information, elder abuse, Medicaid, Medicare, available long term services and supports, nutrition, caregiver information, and more. The Case Management Coordinator will continue to host a monthly informational session allowing local providers of services to sit down with Case Managers and staff from the Aging and Disability Resource Center, Elder Abuse Intervention program, and Information and Assistance and Caregiver Support programs. The provider is given the opportunity to meet the people with whom they might share clients and to educate them on their products and services. Case Managers and other HAAA staff will continue to offer training and education to students from nearby colleges and universities. HAAA will host practicum students from Kirkwood Community College, The University of Iowa, Mount Mercy University, The University of Northern Iowa, and other nearby schools. HAAA partners with Kirkwood Community College as a clinical rotation site for nursing students in the "Community Nursing" portion of their rotation. Nursing students shadow a Case Manager for two days. One day the student shadows a Case Manager working in rural county and the other day they shadow a Case Manager working in a more urban setting. Additionally, HAAA offers several practicum placements for Social Work and Human Services students.

ADRC Activities/Events: For the last two years the HAAA ADRC has hosted a Resource Fair through the HAAA MIPPA grant, which was deemed an utter success. ADRC Options Counselors are all SHIIP trained and participate in SHIIP enrollment events sponsored by The Heritage Agency on Aging. HAAA was provided a unique opportunity through an Options Counseling Grant to bring Options Counseling to minority and non-English speaking individuals throughout the Planning and Service Area. HAAA hired a Minority Outreach Coordinator and charged this individual with improving access to services for this population and with increasing awareness of different cultures' aging and disability needs. The Minority Outreach Coordinator worked to build partnerships with community organizations and individual members of this population. Some examples of partnerships that this position has brought to the agency include Immigrant Concerns group through the Catherine McAuley Center, senate and house representatives, the Bureau for African Families, Justice for Our Neighbors, the Hispanic Pastoral Minister of the Immaculate Conception Church that has a large Spanish-speaking community, local free clinics, local homeless shelters to assist with bilingual residents, school districts to reach out to bilingual families that may include older adult or adults with disabilities, neighborhood centers, and Monsoon, an agency that reaches out to the Asian and Asia Pacific Islanders regarding sexual assault. Even though, that grant ended, that staff member has transitioned into the role of ADRC Program Coordinator and continues to nurture these relationships. At the State level HAAA will continue to advocate for sharing of information that allows for streamlined access to services in determining when people are enrolled into Medicaid waivers, individuals that enrolled into other public long term support services, and those enrolled into Medicaid residing in institutions. This is crucial to creating a seamless system and ease of communication for those navigating the system of long term care services and supports. HAAA will continue to offer input into establishing a fee for the services of the Options Counselor and the continued development of state and federal Options Counseling Standards, as well as development of standardized forms, process and client action plans including client values, needs and preferences as well as, establishing aid the state in establishing Veterans Directed-Home and Community Based Services program and service delivery model that can be replicated throughout Iowa's network of ADRC's.

Barriers/Challenges:

Information and Assistance/Caregiver Barriers/Challenges: Heritage needs to expand our contacts with providers of services to children to see how we can better assist grandparents in their caregiving duties.

Case Management Barriers/Challenges: People want to live in their own homes but the service delivery system can be complicated and difficult to navigate. People need care coordination and help understanding their choices for long term

services and supports. Consumers are accessing services later and often at the point of a health, financial, and/or legal crisis. Consumer's needs are more complicated requiring more expertise and flexible interventions. Case Managers, Options Counselors and Elder Abuse Intervention staff report that the individuals being served at home seem to be frailer and more often have multiple chronic health and mental health conditions. Dysfunctional and dangerous family relationships, legal issues, inadequate dependent adult and lack of elder abuse laws, hoarding, mental illness, lack of appropriate substitute decision makers, and substance abuse are all common barriers to consumer independence and professionals working with them must be skilled at dealing with all of these areas. Dependent adult abuse and elder abuse is a growing problem. Current laws do not fully address the vast array of complicated problems related to the abuse, neglect, self-neglect, and exploitation of older adults and adults with disabilities. One in ten older adults in America is a victim of abuse, neglect, and/or exploitation. One of two victims has dementia and for every case of elder abuse reported, twenty-three cases are NOT reported. Elder abuse can dramatically shorten the life of an older victim. Limited and declining resources in the aging network as a whole further complicate clients' navigation through the Waiver and non-Waiver system to access critical services to remain independent in their homes.

ADRC Barriers/Challenges: A challenge to the ADRC is continued marketing of what the program is and who it can serve. Also, referrals being made through hospitals and other linkage points are becoming more complex and intense in level of intervention. Another obstacle to the ADRC is continued development of the Options Counseling Standards at the State and Federal Level. Heritage is pleased to be at the table with offering language and insight for guidelines.

Lessons Learned:

Information and Assistance and Caregiver Lessons Learned: New family caregivers are not facing the same challenges as past generations. Today, family caregivers are addressing the immediate needs of older adults and people with disabilities they care for in addition to the challenges associated with increased life span, changes in available community supports, economic strains, and the complications of long distance caregiving. Many caregivers are also providing for the needs of a younger generation, such as grandparents raising grandchildren. The Heritage Area Agency on Aging's Family Caregiver Program is in the process of modernizing to better meet the needs of the changing demographics and challenges of family caregivers. Caregivers are more valuable than ever to families and to the home and community based service network. According to an AARP study, the economic value of family caregiving is estimated at \$350 billion nationally, and at \$3.5 billion in the state of Iowa (AARP Iowa website article: Survey Shows One-Third of Americans Play Caregiver Role, posted April 16, 2010).

Case Management Lessons Learned: Many insightful and noteworthy lessons have been lessons in the past years of the Case Management Program. Although The Heritage Case Management program has successfully maneuvered periods of growth and change and while dealing with a steady and consistent decline in funding, insight into the critical need of our Care Connection funding is imperative to fill the lack of non-Medicaid clients needs. The agency sets aside crucial "emergency service funds", Care Connections funding that is accessed by the Care Connections Team members: Case Managers, Resource and Caregiver Support staff, ADRC Options Counselors, and Protective Service Specialists. Case managers are performing at the highest capacity possible with case loads of 70-90 clients per full-time case manager. CMPFE is becoming an increasing resource for local providers as the service delivery system becomes increasingly confusing and complicated. Changes made to the Elder Abuse Initiative (EAI) Program better support the CMPFE system. In the past, a direct service worker for the Elder Abuse Initiative also acted as that person's CMPFE case manager if they were in both programs. The role of the direct service work for EAI has been extracted from CMPFE giving the case manager and the EAI worker a larger system of support and expertise in working with EAI cases. The Care Connections Director has also unified and rebuilt the administration piece of the program that was once divided between two agency subcontractors. This has streamlined the administrative process for our most vulnerable clients.

ADRC Lessons Learned: ADRC's must address the issue of fee-for-service prior to offering the service of Options Counseling. It becomes a branding issue to a program that has begun to have name recognition. HAAA fully supports establishing a fee and encourages ADRC's to establish this first before offering the service. HAAA continues to seek out additional supporters to meet the ever increasing wave of older adults, adults with disabilities and their caregivers. HAAA ADRC will seek to improve its partner base through the efforts of the ongoing marketing and strategic planning to expand services to assist consumers through the ADRC network. A system of seamless service delivery between all of The Heritage Agency's care connections programs has emerged and is working well. Program participants are able to start at

any level (Information and Assistance, ADRC, Caregiver Support, CMPFE, and Elder Abuse Initiative) and receive the level of intervention needed to gain access to options for long term care in the community. The Aging and Disability Resource Center is growing and filling a gap that once existed in the service delivery system with its more client-driven approach to accessing long term care options and information. The program provides more flexibility to the participant than CMPFE does and focuses on a population outside of the eligibility criteria of CMPFE.

Best Practices:

Information and Assistance and Caregiver Best Practices: The Heritage Area Agency on Aging's Information and Assistance Program is working with partners to increase awareness of services available through the Aging Network and Aging and Disability Resource Center (ADRC). Heritage is also working in partnership with stakeholders to identify and implement best practices in relation to call triage, consistency in information provided, AIRS principles, and enhanced program procedures to ensure seamless entry to the Heritage continuum of care. Standardized and detailed policies and procedures are a focus of work over the next few months.

Heritage will continue committee work and collaborations with other providers of information and referral, such as FCFH-Iowa, Inc. (First Call for Help Iowa, Inc.) United Way 2-1-1 and Linn County Community Services to ensure accurate and comprehensive information is being provided to the community. Heritage is an active partner at the federal level by staying abreast of national trends through conferences, publications, trainings and other information sources. Older adults, people with disabilities and family caregivers in the Heritage region expect and will continue to experience a professional willing to listen to their request or concern, ask questions and be provided with information personalized to their needs when they contact Heritage. The Heritage Area Agency on Aging's Family Caregiver Program includes caregiver support and educational opportunities.

Case Management Best Practices: The Case Management Program for Frail Elderly (CMPFE) started as a pilot project in two counties in Iowa with one being situated in HAAA's Planning and Service Area. This innovative program was developed as a result of recommendations from the Senior Living Coordinating Unit (formerly the Long Term Care Coordinating Unit) and was designed to address emerging evidence that, as the availability of home and community based care increased, so did the need for more coordination across systems and amongst service providers. HAAA became one of the first Area Agencies on Aging to participate as a CMPFE provider and has grown the program to serve more than eight hundred frail, older adults in a seven county region. Case managers are keeping abreast of information that their clients need to make the best choices possible for home and community based care which allows clients to maintain safely in their own home longer. Due to tightening eligibility requirements and the downsizing and slow down within the Department of Human Services systems; case managers are have increased their knowledge base regarding all aspects of the service delivery system. They have become experts on topics such as appeals, local services, processing of applications for waiver and facility, and who to talk to when something goes wrong. Additionally, case managers have refined relationships with medical professionals. They find they need to know the personalities of the different offices in order to get the Level of Care pushed through for clients. Tightening eligibility requirements and delays have also forced the case managers to become increasingly creative in order to meet the needs of clients when waiver is not an option and no other funding exists.

ADRC Best Practices: HAAA has been an Aging and Disability Resource Center (ADRC) since 2009/2010 when the first grants were awarded to Area Agencies on Aging in Iowa. In the past three years, HAAA has taken the ADRC from a two county pilot site to a regional service provider that is recognized as the gateway to long term services and supports for all people and all payers. HAAA ADRC has a solid reputation of partnership recruitment, building, and nurturing beginning with the first partnership developed at the inception of the grant. HAAA ADRC will engage in a new partnership this Fiscal Year. The HAAA ADRC will partner with Iowa COMPASS to strengthen the disability services available through its ADRC. This partnership will include the co-location of a HAAA ADRC Options Counselor at the Iowa COMPASS offices. HAAA is excited about current efforts to bring new partners to the ADRC table. The Balancing Incentive Payment Program (BIPP), One Click/One Call project, Lifespan Respite, and the redesign of Iowa's mental health system can only allow increased awareness of the ADRC as well as further provide linkages to clients and partners. HAAA values strengthening relationships with Accountable Care Organizations, the Department of Human Services and the VA Medical Center in Iowa City. HAAA continues to work closely with Iowa Department on Aging in continued ADRC development. HAAA looks toward future growth activities to develop and implement a model for delivering the Veteran Directed-Home and Community Based Services (VD-HCBS) program in the HAAA ADRC service area. The model will be used in the expansion of the VD-HCBS into additional ADRC service areas. At the State level HAAA will continue to advocate for sharing of

information that allows for streamlined access to services in determining when people are enrolled into Medicaid waivers, individuals that enrolled into other public long term support services, and those enrolled into Medicaid residing in institutions. This is crucial to creating a seamless system and ease of communication for those navigating the system of long term care services and supports. HAAA will continue to offer input into establishing a fee for the services of the Options Counselor and the continued development of state and federal Options Counseling Standards, as well as development of standardized forms, process and client action plans including client values, needs and preferences as well as, establishing forms and processes and Options Counseling Standards on a state and federal level.

Performance Measure 1:

Data Report for AAA:

Quarter/Year:

IDA Comment Section:

AAA Response upon Request:

Data Table: (1) Percent of Projected 3A-1 Consumers Served and (2) Percent of Projected 3A-1 Units of Service Provided to Consumers

Mandatory Service	3A-1 Projected Goal	1st Quarter		2nd Quarter		3rd Quarter		4th Quarter	
		July to Sept 2013 / Actual	% of Goal Met	July to Dec 2013 / Actual	% of Goal Met	July 2013 to March 2014 / Actual	% of Goal Met	July 2013 to June 2014 / Actual	% of Goal Met
Case Management	# Consumers		%		%		%		%
	# Units		%		%		%		%
Congregate Meals	# Consumers		%		%		%		%
	# Units		%		%		%		%
Health Promotion	# Consumers		%		%		%		%
	# Units		%		%		%		%
Home Delivered Meals	# Consumers		%		%		%		%
	# Units		%		%		%		%
Information & Assistance	# Consumers		%		%		%		%
	# Units		%		%		%		%
Legal Assistance	# Consumers		%		%		%		%
	# Units		%		%		%		%
Nutrition Counseling	# Consumers		%		%		%		%
	# Units		%		%		%		%
Nutrition Education	# Consumers		%		%		%		%
	# Units		%		%		%		%

Attachment 16

Performance Measure 2: Congregate Meal Site Consumer Registration

NARRATIVE REPORT

Area Plan Goal: Enable lowans 60+ and their families to make informed decisions about, and be able to easily access, existing home and long-term living and community supports.

Output: The number of congregate meal site consumers and number of congregate meal site consumer registrations completed.

Measure:

(1) At least 90% of consumers complete an Aging and Disability Network Intake Registration Form once during the state fiscal year in which they receive a congregate meal and/or another registered service.

Outcome: Consumers benefit from a more efficient registration process and have greater access to and information about existing home and long-term living and community supports.

Activities, Events:

The Heritage Area Agency on Aging congregate meal sites provide participants with more than a nutritious meal. Information on an array of additional services are available. Sites may offer a variety of the following activities: social events such as dances, card games, movies, puzzles, brain teasers, and holiday-themed events. Health promotion activities may also be offered which could include some of the following: blood pressure and health screenings, exercise classes, presentations from SHIP and other community partners, and monthly nutrition education presentations. Examples of recent events include The Tipton Senior Center site hosting the "Road Course" senior driving study sponsored by the University of Iowa, The Iowa City Senior Center hosted a SNAP presentation by AARP and also offered "A Matter of Balance, Managing Concerns About Falls" evidence-based falls awareness program.

Barriers/Challenges:

There are several challenges impacting the Heritage congregate meal program currently. One of the largest barriers of the Heritage congregate program is the significant decline in attendance, especially in the most rural locations. One of the main causes lies in the trend of older adults moving closer to family or caregivers for support and greater access to medical care and services. Other identified challenges include the diverse variations of tastes and expectations of current congregate participants and the increasing trend of congregate participants transitioning to the home delivered meal program. Missing data on INAPIS registrations has also created some barriers by negatively impacting the comprehensive nature of information available to assist in developing a strategic plan to further enhance the Heritage Regional Senior Nutrition Program.

Lessons Learned:

Heritage has garnered insight that it must develop a menu that appeals to multiple older adult populations, the "older-older adult" and the "baby boomers" who are just starting to participate in the program. Another significant lesson learned was the critical importance of the need to explain in detail the multi-faceted impact the collection of INAPIS data has on the Heritage Regional Senior Nutrition Program to providers. Increasing providers' understanding that the completion of INAPIS forms is not only part of overall monitoring and evaluation of the program but this information also impacts Heritage's ability to access funds regionally. This was essential to demonstrate the mutual benefit and positive response from providers. Another critical realization was that there remains a significant lack of community awareness of the congregate program, especially with potential community members that would be able to provide additional resources and supports.

Best Practices:

Heritage considers our methods of contract monitoring a best practice model. During the annual site visit conducted by the Heritage Nutrition Coordinator, each site is evaluated on the presentation of educational resources and the amount and quality of the site's activities. Each provider is required to provide a completed INAPIS form on each nutrition participant, congregate and home delivered, before payment for the service is issued. This has brought a significant improvement in the information that is available through INAPIS. INAPIS data now can and has provided Heritage with better information for consideration in decision making related to the future development of the Heritage Regional Senior Nutrition Program; especially when seeking supplemental funding and resource supports. One unexpected success of this improved process was that Heritage providers realized the quality of the information now available and have requested this information for their use in seeking funds to further supplement Heritage funding and the expansion of services. Heritage has made great strides in expanding community awareness in our region and educating partners on the current needs of the program. Unfortunately, financial barriers, decreasing trends in participation and voluntary contributions has had a dramatic negative impact on the number of meals that can be served in the Heritage region. Ultimately the above-mentioned efforts, despite financial hurdles have successfully developed several new partnerships that led to the purchasing of raw food products at cost through local supermarkets. This resulted in substantial cost savings for providers. New founded partnerships have also assisted Heritage in raising funds that were distributed to nutrition providers to supplement the previously awarded funding. One particular collaborative partnership allowed for the relocation of a congregate dining site to a newly renovated space in a rural community. This facilitated increased programming, improved and dedicated space which ultimately increased participation and truly benefitted older adults in this rural community.

HAAA PSA 4 SFY 2014-2015

Performance Measure 2

Data Report for AAA:

Quarter/Year:

Goal: Measure 2

At least 90% of consumers complete an Aging and Disability Network Intake Registration form once during the state fiscal year in which they receive a congregate meal and/or another registered service.

IDA Comment Section:

AAA Response upon Request:

Data Table: Congregate Meal Site Consumer Registration

Congregate Meal Consumers Forms Completed % of Consumers Registered	1st Quarter July to Sept 2013 Actual		2nd Quarter July to Dec 2013 Actual		3rd Quarter July 2013 to March 2014 Actual		4th Quarter July 2013 to June 2014 Actual		% of Goal Met	FY2014 Baseline
# Consumers										
# Forms Completed										
% of Consumers Registered		%		%		%		%		

HAAA PSA 4 - SFY 2014-2015

Attachment 17: Public Hearing Documentation for Area Plan and Direct Service Waiver

HAAA PSA 4 SFY 2014-2015

PROOF OF PUBLICATION

State of Iowa, Iowa County: SS

I, LITA YORK being duly sworn, do depose and say that I am Assistant to the Publisher of The Journal Tribune, of Iowa County, a weekly newspaper of general circulation, published at Williamsburg, Iowa County, Iowa, and that I am personally cognizant of the matters herein contained; that the annexed notice was published in said paper in its weekly edition on the following consecutive date(s):

NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES
To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code, Chapter 17 - 6.2(7)a.(2):
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
PR, JT 08-11

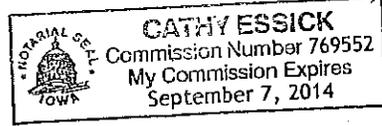
2/21/13
AG# 389006-80

Publication fee \$ 14.73
Yitayore

Subscribed in my presence, and sworn to before me by the said

Yitayore
the 15 day of March 2013
Cathy Essick

Notary Public



PROOF OF PUBLICATION

State of Iowa, Benton County: SS

I, LITA YORK being duly sworn, do depose and say that I am Assistant to the Publisher of The Star Press Union of Benton County, a weekly newspaper of general circulation, published at Belle Plaine, Benton County, Iowa, and that I am personally cognizant of the matters herein contained; that the annexed notice was published in said paper in its weekly edition on the following consecutive date(s):

NOTICE OF PUBLIC HEARING ON
MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-6.2(7)a.(2).

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

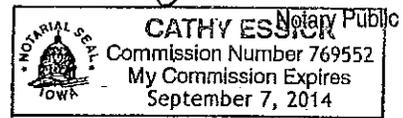
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 82A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

2/21/2013
OCCT# 3891006-80

Publication fee \$ 14.73
Kita Yane

Subscribed in my presence, and sworn to before me by the said

Kita Yane
the 15 day of March 20 13
Cathy Essick



PROOF OF PUBLICATION

State of Iowa, Iowa County: SS

I, LITA YORK being duly sworn, do depose and say that I am Assistant to the Publisher of The Journal Tribune, of Iowa County, a weekly newspaper of general circulation, published at Williamsburg, Iowa County, Iowa, and that I am personally cognizant of the matters herein contained; that the annexed notice was published in said paper in its weekly edition on the following consecutive date(s):

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES**

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2)

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013, from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
PR, JT 08-11

2/21/2013

ACC# 389000-80

Publication fee \$ 14.73

Lita York

Subscribed in my presence, and sworn to before me by the said

Lita York

the 15 day of March 20 13

Cathy Essick

Notary Public
CATHY ESSICK
Commission Number 769552
My Commission Expires
September 7, 2014

HAAA PSA 4 SMY 2014-2015

STATE OF IOWA, CEDAR COUNTY, ss:

I, Stuart S. Clark, publisher of The Tipton Conservative and Advertiser, a weekly newspaper of general circulation, published in said county, being duly sworn do declare and say that a notice, of which one hereto attached is a copy, was published in the said

The Tipton Conservative and Advertiser one time.

to wit on 02/13/13

Stuart S. Clark

Subscribed and sworn to before me this 13

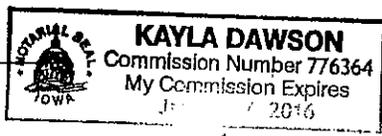
day of February A.D. 20 13

Kayla Dawson
Notary Public in and for Cedar County, Iowa

Received of _____

_____ Dollars

Printer's fee \$ 15.09



Legal Notice

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA, JOHNSON,
JONES, LINN AND WASHINGTON
COUNTIES**

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College, main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

27

C7

RECEIVED
MAR 07 2013

BY: _____

HAAA PSA 4 SFY 2014-2015

109

RECEIVED
FEB 29 2013

NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES
To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2).
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
Published in the Monticello, Iowa, Express Feb. 20, 2013.

State of Iowa, Jones County, ss BY: _____

I, Mark Spensley, being duly sworn, state that I am the publisher of THE MONTICELLO EXPRESS, a newspaper published at Monticello, Jones County, Iowa, and that the attached notice was published in said newspaper for 1 consecutive weeks beginning 2-20 2013 and ending 2-20 2013. Printer's fees, \$ 14.04.

Mark Spensley

Subscribed in my presence and sworn to before me by Mark Spensley, on this 27 day of Feb., 2013.

Sheryl L. McElmeel

 SHERYL L. McELMEEL
Commission Number 131056
My Commission Expires 2-1-14

Notary Public

RECEIVED
FEB 29 2013

NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES
To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2).
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
Published in the Monticello, Iowa, Express Feb. 20, 2013.

State of Iowa, Jones County, ss BY: _____

I, Mark Spensley, being duly sworn, state that I am the publisher of THE MONTICELLO EXPRESS, a newspaper published at Monticello, Jones County, Iowa, and that the attached notice was published in said newspaper for 1 consecutive weeks beginning 2-20 2013 and ending 2-20 2013. Printer's fees, \$ 14.04.

Mark Spensley

Subscribed in my presence and sworn to before me by Mark Spensley, on this 27 day of Feb., 2013.

Sheryl L. McElmeel

 SHERYL L. McELMEEL
Commission Number 131056
My Commission Expires 2-1-14

Notary Public

HAAA PSAY SFY 2014-2015

PROOF OF PUBLICATION

State of Iowa, Benton County: SS

NOTICE OF PUBLIC HEARING ON
MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES

To older persons, public officials and
other interested parties, pursuant to
Iowa Administrative Code Chapter 17
6.2(7)g, (2):

The public is notified and invited to
attend a public hearing being conduct-
ed by The Heritage Area Agency on Ag-
ing regarding the 2014-2015 Area Plan
for the seven county region (Benton,
Cedar, Iowa, Johnson, Jones, Linn and
Washington counties). The purpose of
this public hearing is to gather input
and comments from interested parties,
including priority services. The area
plan will guide Heritage for the period
of State Fiscal Years 2014-2015.

The public hearing will be conducted
on Wednesday, March 13, 2013 from
12:30 p.m. to 1:30 p.m. at The Heritage
Area Agency on Aging, Building 32A,
Kirkwood Community College main
campus, 6301 Kirkwood Blvd, SW, Ce-
dar Rapids, Iowa 52404. The public is
invited and encouraged to attend.

SPU 8 11

Will Sells being duly
sworn, do depose and say that I am Assistant to the
Publisher of The Star Press Union of Benton
County, a weekly newspaper of general circulation,
published at Belle Plaine, Benton County, Iowa, and
that I am personally cognizant of the matters herein
contained; that the annexed notice was published
in said paper in its weekly edition on the following
consecutive date(s):

Feb. 20, 2013

Acct. # 389006-80

Publication fee \$ 14.73

Will Sells

Subscribed in my presence, and sworn to before
me by the said

RECEIVED
FEB 25 2013
BY: _____

Will Sells
the 22 day of Feb. 2013
Cathy Essick

Notary Public
CATHY ESSICK
Commission Number 769552
My Commission Expires
September 7, 2014

PROOF OF PUBLICATION

State of Iowa, Iowa County: SS

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES**

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
PR, JT 08-11

Jill Sells being duly sworn, do depose and say that I am Assistant to the Publisher of The Journal Tribune, of Iowa County, a weekly newspaper of general circulation, published at Williamsburg, Iowa County, Iowa, and that I am personally cognizant of the matters herein contained; that the annexed notice was published in said paper in its weekly edition on the following consecutive date(s):

Feb. 21, 2013

Acct # 389006-80

Publication fee \$ 14.73

Jill Sells

Subscribed in my presence, and sworn to before me by the said

RECEIVED
FEB 25 2013

BY: _____

Jill Sells
the 22 day of Feb, 2013
Cathy Essick

Notary Public

NOTARY SEAL
CATHY ESSIICK
Commission Number 769552
My Commission Expires
September 7, 2014

HAATA

BSA 4

SFY 2014-2015

112

PROOF OF PUBLICATION

State of Iowa, Iowa County: SS

I, Lita Hagen-York being duly sworn, do depose and say that I am Assistant to the Publisher of The Pioneer-Republican, of Iowa County, a weekly newspaper of general circulation, published at Marengo, Iowa County, Iowa, and that I am personally cognizant of the matters herein contained; that the annexed notice was published in said paper in its weekly edition on the following consecutive date(s):

NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES
To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2):
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd, SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
PR, JT 08-1t

2/21/2013
OCCT# 38900680

Publication fee \$ 14.73
Lita Hagen-York
Subscribed in my presence, and sworn to before me by the said

Lita Hagen-York
the 22 day of February 2013
Cathy Essick

RECEIVED
FEB 25 2013
BY: _____

Notary Public
CATHY ESSICK
Commission Number 769552
My Commission Expires
September 7, 2014

Printer's Fee \$ 15.23

CERTIFICATE OF PUBLICATION

STATE OF IOWA,

JOHNSON COUNTY, SS:

THE IOWA CITY PRESS-CITIZEN

FED.ID#42-0330670

I, ROGER SWARTZ

being duly sworn, say that I am the legal clerk of the IOWA CITY PRESS-CITIZEN, a newspaper published in said county, and that a notice, a printed copy of which is hereto attached, was published in said paper 1 time(s), on the following date(s):

FEBRUARY 14, 2013

Roger Swartz
Legal Clerk

Subscribed and sworn to before me this 14th day of February A.D. 20 13.

Linda Krotz

Notary Public



LINDA KROTZ
Commission Number 732619
My Commission Expires
January 27, 2014

OFFICIAL PUBLICATION

NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17, 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

PC-6000017835

February 14, 2013

RECEIVED
MAR 08 2013

BY: _____

PROOF OF PUBLICATION

Public Notice

NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA, JOHNSON, JONES,
LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd., SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

State of Iowa, Cedar County, ss:

I, Gregory Norfleet, Editor of the West Branch Times, a weekly newspaper of general circulation published at West Branch, in said county, and being duly sworn, do declare and say that a Notice, of which one hereto attached is a copy, was published in said West Branch Times respectively:

2-14-13

Gregory R. Norfleet

Fee: \$ 12.30

Sworn to by said Gregory Norfleet before me and signed by

him in my presence this _____

day of _____,

Notary Public

RECEIVED
MAR 11 2013
BY: _____

Received of

Dollars

in full on above publication.

HAATA PSA 4 SFY 2014-2015

STATE OF IOWA, Jones County, ss

I, W. James Johnson, being duly sworn, depose and say that I am the editor of The Anamosa Journal-Eureka, a newspaper published weekly in Anamosa, in said county, and that

Heritage Agency for Aging
6301 Kirkwood Blvd SW 32A
Cedar Rapids, IA 52404

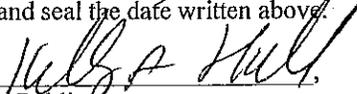
in the case of Heritage Agency public hearing, a copy of which is hereto attached, was published in said newspaper for 1 weeks consecutively; the first publication having been made on Feb 21, 2013 and the last on Feb 21, 2013

Publication Fee: \$17.69



W. James Johnson, Date: 2-21-13

Subscribed by W. James Johnson and by him sworn to before me, a notary public, dated 2-21-13 Witness my hand and seal the date written above.



Notary Public

 **KELLY A HALL**
Commission Number 764571
My Commission Expires
September 08, 2013

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA, JOHNSON,
JONES/LINN AND WASHINGTON
COUNTIES**

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-6.2(7)(A)(2):
The public is notified and invited to attend a public hearing being conducted by the Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at the The Heritage Agency on Aging, building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd, SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
Published in the February 21, 2013 Anamosa Journal-Eureka.

RECEIVED
FEB 25 2013
BY: _____

HAANA PSA 4 - SFY 2014-2015

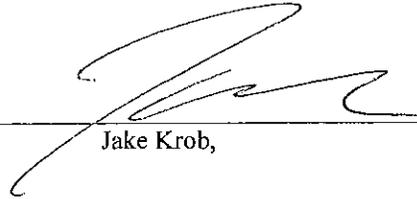
PUBLISHER'S CERTIFICATE

STATE OF IOWA }
County of Linn } ss.

I, Jake Krob, being duly sworn, on my oath to do say, that I am publisher of the Marion Times, a Newspaper issued weekly at Marion, in said County of Linn; that the Notice of which the attached printed copy taken from the printed files of said Newspaper is a copy, was inserted and published in said Newspaper in the issue of

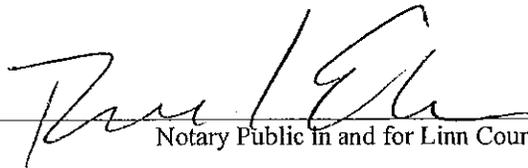
Feb. 14, 2013

and the reasonable fee for publishing said Notice is \$18⁸⁸

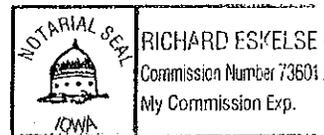


Jake Krob, Publisher

Subscribed by the above named Jake Krob in my presence, and by him sworn before me, at Mount Vernon, Linn County, Iowa.



Notary Public in and for Linn County, Iowa



E-11-14

RECEIVED
FEB 25 2013
BY: _____

PUBLIC NOTICE

NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington coun-

ties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013, from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

Published in the Marion Times February 14, 2013

HAAA PSA 4 SFY 2014-2015

AFFIDAVIT OF PUBLICATION

STATE OF IOWA }
Washington County } SS.

Mathew W. Bryant being first duly sworn on oath deposes and says that he is Publisher of the The Washington Evening Journal, and that he has knowledge of the facts herein alleged, and is the publisher of The Washington Evening Journal, a weekly newspaper published in the city of Washington, Washington County, Iowa, and that the Notice, a copy of which is hereto attached, was published for 2 consecutive days, in said The Washington Evening Journal 1 time each day, the 1st insertion occurring the 13 day of February 2013, the 2nd insertion the _____ day of _____, 2013, the 3rd insertion the _____ day of _____, 2013, and the 4th insertion the _____ day of _____, 2013.

Signed and dated this 13 day of February A.D. 2013.

Mathew W. Bryant

Printer's Legal Fee \$ 16.45

Subscribed and sworn to by Mathew W. Bryant

Before me this 13 day of February, 2013.



Jaime M. Carpenter

Notary Public

PUBLIC NOTICE
NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES
To older persons, public officials and other interested parties pursuant to Iowa Administrative Code Chapter 175.62(7)(a) (2). The public is notified and invited to attend a public hearing being conducted by the Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013, from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 324, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend. Published in the Washington Evening Journal, February 13, 2013.

HAAA PSA 4
SFY 2014-2015

STATE OF IOWA
Counties of Linn and Johnson

ss.

RECEIVED
FEB 19 2013
BY: _____

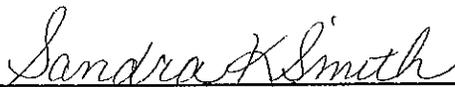
I, Tim McDougall, do state that I am the publisher of THE GAZETTE, a daily newspaper of general circulation in Linn and Johnson Counties, in Iowa. The notice, a printed copy of which is attached, was inserted and published in THE GAZETTE newspaper in the issue(s) of February 15, 2013.

The reasonable fee for publishing said notice is \$13.80

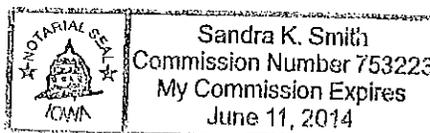
NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES
To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-6.2(7)a.(2):
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015. The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.



This instrument was acknowledged by Tim McDougall before me on February 15, 2013.



Notary Public in and for the State of Iowa



STATE OF IOWA
Counties of Linn and Johnson

ss.

RECEIVED
FEB 19 2013
BY: _____

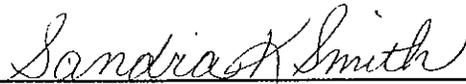
I, Tim McDougall, do state that I am the publisher of THE GAZETTE, a daily newspaper of general circulation in Linn and Johnson Counties, in Iowa. The notice, a printed copy of which is attached, was inserted and published in THE GAZETTE newspaper in the issue(s) of February 15, 2013.

The reasonable fee for publishing said notice is \$13.80

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES**
To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2):
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.



This instrument was acknowledged by Tim McDougall before me on February 15, 2013.



Notary Public in and for the State of Iowa

 Sandra K. Smith
Commission Number 753223
My Commission Expires
June 11, 2014

RECEIVED
FEB 20 2013
BY: _____

PUBLIC NOTICE

NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7) a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend. 12-7-1 (38L, 1p)

Published in *The Riverside Current* Thursday, February 14, 2013.

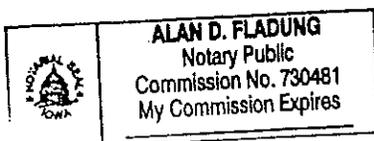
Proof of Publication

State of Iowa, Washington, County, ss

I, Ranee Gladys, publisher of *The Riverside Current*, a weekly newspaper, published and printed in said County, and of general circulation therein, do solemnly swear that a notice, of which the annexed is a true copy, was published in said paper on the 14 day of Feb., 2013.

Subscribed and sworn to by Ranee Gladys, before me this 16 day of Feb., 2013.

Printers Fee \$ 16.53



Alan D. Fladung
My Commission Expires 9-13 2012

HAAA
PSA 4 9-13-12 SFY 2014-2015

121

RECEIVED
FEB 20 2013

BY: _____

PUBLIC NOTICE

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES**

gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-6.2(7)a.(2):

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to

12-7-1 (34L, 1p)
Published in The Wellman Advance Thursday, February 14, 2013.

Proof of Publication

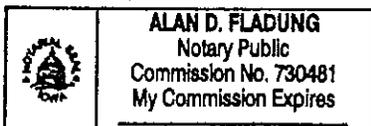
State of Iowa, Washington, County, ss

I, Rance Gladys, publisher of The Wellman Advance, a weekly newspaper, published and printed in said County, and of general circulation therein, do solemnly swear that a notice, of which the annexed is a true copy, was published in said paper on the 14 day of Feb., 2013.

Subscribed and sworn to by Rance Gladys, before me this 16 day of Feb., 2013.

Printers Fee \$ 14.79

Alan D. Fladung



My Commission Expires 9/13 20 13

9-12-13

HAAA

PSA 4

SFY 2014-2015

122

**NOTICE OF PUBLIC HEARING ON
MULTIYEAR AREA PLAN FOR
BENTON, CEDAR, IOWA, JOHNSON,
JONES, LINN AND WASHINGTON
COUNTIES**

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 8.2(7)a.(2)

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

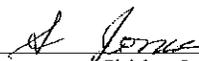
Published February 15, 2013 in the Midland Times at Wyoming, Iowa.

State of Iowa, Jones County, ss.

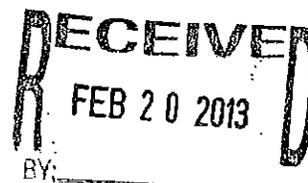
I, Shirley Jones, being fully sworn, state that I am the publisher of the MIDLAND TIMES, a newspaper published at Wyoming, Jones County, Iowa, and that the attached notice was published in said newspaper on 2-15, 2013

Printer's fees: \$ 16.76

I, Shirley Jones, do hereby state that I certify under penalty of perjury and pursuant to the laws of the State of Iowa that the preceding is true and correct as I verily believe.



Shirley Jones, Publisher
2-16, 2013



HAAA

PSA 4 SA 2014-2015

123

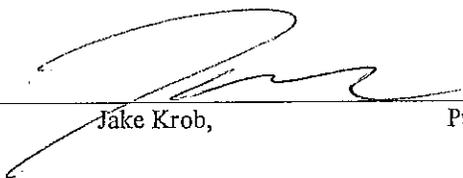
PUBLISHER'S CERTIFICATE

STATE OF IOWA }
County of Linn } ss.

I, Jake Krob, being duly sworn, on my oath to do say, that I am publisher of the Sun, a Newspaper issued weekly at Mount Vernon and Lisbon, in said County of Linn; that the Notice of which the attached printed copy taken from the printed files of said Newspaper is a copy, was inserted and published in said Newspaper in the issue of

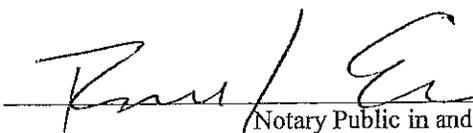
Feb. 21, 2013

and the reasonable fee for publishing said Notice is \$16.77

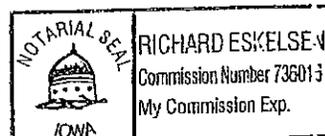


Jake Krob, Publisher

Subscribed by the above named Jake Krob in my presence, and by him sworn before me, at Mount Vernon, Linn County, Iowa.



Notary Public in and for Linn County, Iowa



8-11-14

RECEIVED
FEB 29 2013
BY: _____

NOTICE OF PUBLIC HEARING

ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-6.2(7)a(2), notice is hereby given that the public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 8301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

Published in the Sun, Feb. 21, 2013

THE KALONA NEWS

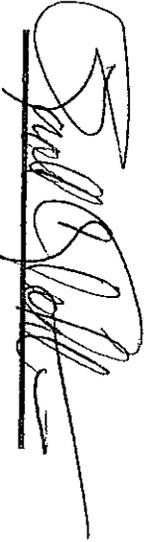
OFFICIAL PAPER - WASHINGTON COUNTY
TOWN OF KALONA
MID-PRAIRIE COMMUNITY SCHOOLS
RONALD C. SLECHTA, PUBLISHER
KALONA, IOWA

CERTIFICATION OF PUBLICATION

State of Iowa, Washington County, ss:

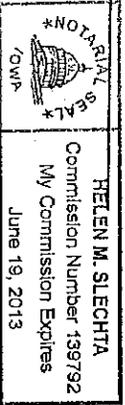
I, Ronald C. Slechta, being first duly sworn, do on oath depose and say that I am the owner and publisher of The Kalona News, a news-paper published 52 weeks per year in Kalona, Washington County, Iowa and that the notice, a printed copy of which is attached hereto was published in The Kalona News as follows:

February 14, 2013



RONALD C. SLECHTA, Publisher

Subscribed and sworn to before me by Ronald C. Slechta
this 14th day of February, 2013
Total cost of publication is \$ 13.71



NOTICE OF PUBLIC HEARING
ON MULTYEAR AREA PLAN FOR
BENTON, CEDAR, IOWA, JOHNSON,
JONES, LINN AND WASHINGTON
COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7) a(2):
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.
The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd., SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
Published in The Kalona News, Thursday, February 14, 2013-L-30

RECEIVED
MAR 04 2013
BY: _____

THE LONE TREE REPORTER

OFFICIAL PAPER - JOHNSON COUNTY
TOWN OF LONE TREE ~ LONE TREE COMMUNITY
SCHOOLS
RONALD C. SLECHTA, PUBLISHER
LONE TREE, IOWA

CERTIFICATION OF PUBLICATION

State of Iowa, Johnson County, ss:

I, Ronald C. Slechta, being first duly sworn, do on oath depose and say that I am the owner and publisher of The Lone Tree Reporter, a newspaper published 52 weeks per year in Lone Tree, Johnson County, Iowa and that the notice, a printed copy of which is attached hereto was published in The Lone Tree Reporter as follows:

February 14, 2013



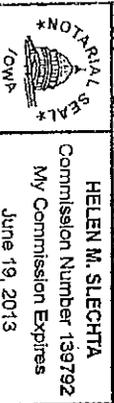
RONALD C. SLECHTA, Publisher

Subscribed and sworn to before me by Ronald C. Slechta

this 14th day of February, 2013

Total cost of publication is \$ 11.88

Helen M. Slechta



**NOTICE OF PUBLIC HEARING ON
MULTIYEAR AREA PLAN FOR BEN-
TON, CEDAR, IOWA, JOHNSON,
JONES, LINN AND WASHINGTON
COUNTIES**

To older persons, public officials and other in-
terested parties, pursuant to Iowa Administra-
tive Code Chapter 17-62(7)(a)(2).

The public is notified and invited to attend
a public hearing being conducted by The
Heritage Area Agency on Aging regarding
the 2014-2015 Area Plan for the seven county
region (Benton, Cedar, Iowa, Johnson, Jones,
Linn and Washington counties). The purpose
of this public hearing is to gather input and
comments from interested parties, including
priority services. The area plan will guide
Heritage for the period of State Fiscal Years
2014-2015.

The public hearing will be conducted on
Wednesday, March 13, 2013 from 12:30 p.m.
to 1:30 p.m. at The Heritage Area Agency on
Aging, Building 32A, Kirkwood Community
College main campus, 6301 Kirkwood Blvd.
SW, Cedar Rapids, Iowa 52404. The public is
invited and encouraged to attend.

Published in the Lone Tree Reporter
Thursday, February 14, 2013, L-26

RECEIVED
MAR 04 2013
BY: _____

I, Rae Ann Holub, being duly sworn on my oath do say that I am Editor of the LINN NEWS-LETTER, a newspaper issued weekly and printed at Central City, in said County of Linn; that the Notice of which the annexed printed copy taken from the printed files of said newspaper is a copy, was inserted and published in said Newspaper in the issues of

2/5; 2/19

an reasonable fee for publishing said Notice is: \$23.79

Subscribed by the above named Rae Ann Holub in my presence, and by her sworn to before me, at Central City, Linn County, Iowa, on this 4 day of February A.D., 20 13

Given under my hand and Notarial Seal

[Signature]
Notary Public in and for Linn County, Iowa

DEBORRAH K. MCCHESENEY
Notary Seal, Iowa
Commission Number 767267
Commission Expires 3/11/14

Linn News-Letter
By *[Signature]*

Received payment for above 20

HERITAGE AGENCY

2/5/13 - Public Notice - Request for Proposals (RFP) - Second Release
39 lines @ .610 = \$23.79

2/19/13 - Notice of Public Hearing on Multiyear Area Plan
32 lines @ .610 = \$19.52

**PUBLIC NOTICE
REQUEST FOR PROPOSALS (RFP)
2nd RELEASE**

The Heritage Area Agency on Aging/Kirkwood Community College is seeking applications from any non-profit agency or private organization to provide nutrition services through congregate and/or home delivered meals to individuals age 60 and older, in Benton, Iowa, Johnson, northern Linn and/or Washington counties. The agency will award two-year contracts. Applications are for the period of July 1, 2013 through June 30, 2015.

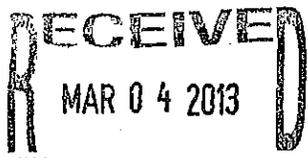
The original RFP for this area was released on August 1, 2012 and due on December 3, 2012. The Heritage Area Agency on Aging is reissuing the RFPs for a variety of reasons which include: incomplete applications, insufficient response to narrative questions, proposed budgeting errors and lack of demonstrated cost effectiveness. All previous applicants and potential new applicants are encouraged to apply.

More information including goals of the Regional Nutrition Program, critical dates in the application process, and descriptions of desired services was announced in detail on the website www.heritagearea.org on or before January 28, 2013. The RFP and release application and supporting documentation is due no later than 5:00 p.m. on Thursday, February 28, 2013. Published in the Linn News-Letter, February 5, 2013.

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA, JOHNSON,
JONES, LINN AND WASHINGTON COUNTIES.**

To older persons, public officials and other interested parties pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a(2).
The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College, main campus, 6301 Kirkwood Blvd SW Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.
Published in the Linn News-Letter, February 19, 2013.



BY:
SAV 2014-2015

HAAA PSA 4

CEDAR VALLEY TIMES

108 E. 5th Street, Vinton, IA 52349 ♦ Phone 319-472-2311 ♦ Fax 319-472-4811

Proof of Publication

State of Iowa

Publication Fee \$13.22

Benton County

I, Molly Wade, news editor of the Cedar Valley Times, a weekly newspaper of general circulation, published at Vinton, Benton County, Iowa, swear that the notice hereto attached was published in said newspaper on the following date(s):

February 15th, 2013.

Molly Wade
Editor

Sworn to and subscribed in my presence by the said editor this 18th day of February, 2013.

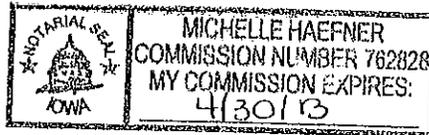
Michelle Haefner
Notary Public

PUBLIC NOTICE NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 - 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging Building 32A, Kirkwood Community College, main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.



RECEIVED
MAR 04 2013
BY: _____

HAAA PSA 4 SFY 2014-2015

128

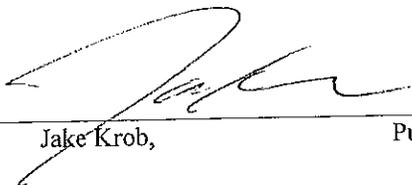
PUBLISHER'S CERTIFICATE

STATE OF IOWA }
County of Johnson } ss.

I, Jake Krob, being duly sworn, on my oath to do say, that I am publisher of the Leader, a Newspaper issued weekly at Solon in said County of Johnson; that the Notice of which the attached printed copy taken from the printed files of said Newspaper is a copy, was inserted and published in said Newspaper in the issue of

Feb. 20, 2013

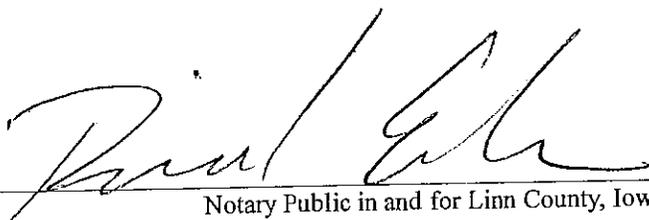
and the reasonable fee for publishing said Notice is \$12²⁰



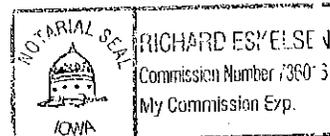
Jake Krob,

Publisher

Subscribed by the above named Jake Krob in my presence, and by him sworn before me, at Solon, Johnson County, Iowa.



Notary Public in and for Linn County, Iowa



8-11-14

PUBLIC NOTICE: HERITAGE AGENCY

**NOTICE OF PUBLIC HEARING
ON MULTIYEAR AREA PLAN
FOR BENTON, CEDAR, IOWA, JOHN-
SON, JONES, LINN AND WASHINGTON
COUNTIES**

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17--6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washing-

ton counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College (main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404). The public is invited and encouraged to attend.

RECEIVED
MAR 06 2013
BY: _____

PUBLISHER'S CERTIFICATE

STATE OF IOWA }
County of Johnson } ss.

I, Jake Krob, being duly sworn, on my oath to do say, that I am publisher of the Economist, a Newspaper issued weekly at Solon in said County of Johnson; that the Notice of which the attached printed copy taken from the printed files of said Newspaper is a copy, was inserted and published in said Newspaper in the issue of

Feb. 20, 2013

and the reasonable fee for publishing said Notice is \$12⁷⁰

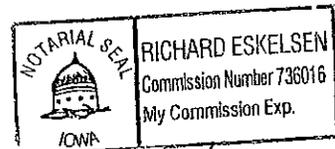
[Signature]

Jake Krob, Publisher

Subscribed by the above named Jake Krob in my presence, and by him sworn before me, at Solon, Johnson County, Iowa.

[Signature]

Notary Public in and for Linn County, Iowa



8-1-14

RECEIVED
MAR 06 2013
BY: _____

PUBLIC NOTICE: HERITAGE AGENCY

NOTICE OF PUBLIC HEARING ON MULTIYEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17-62(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washing-

ton counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.



The Heritage Agency



About Us | Meeting Schedule | Task Forces | History | Advocacy | Local Services | Funding | Planning | Publications | Links | Contact

- ADRC
- Elder Abuse Intervention
- Nutrition RFP
- 2nd Release Application and Forms
- Public Hearing Announcement
- Public Notice 2nd Request for Nutrition Proposals
- RFP FAQ
- Case Management
- Family Caregiver Support
- Mission
- Older Iowans Fund

Home

Welcome to The Heritage Area Agency on Aging Web Page!

Please check out our website for more information or contact us electronically through this site or directly at 319-398-5559 or 800-332-5934.

We are delighted to serve you!

Today's older adults are pioneers in a changing, challenging world. Many are looking forward to longer, more active lives and exciting new ways to contribute to society. The Heritage Area Agency on Aging believes that older adults should have opportunities for lifelong learning in addition to a secure and joyful life, free from basic want.

Heritage is one of 667 Area Agencies on Aging nationwide and one of only 13 in Iowa. Authorized by the Older Americans Act of 1965 (revised), the Heritage Agency has been a department of Kirkwood Community College since 1973. Our staff is dedicated to educating professionals, employers, volunteers and community residents to meet the challenges that face older adults and their families in our ever-changing and aging world.

The agency plans, coordinates and funds a variety of human services programs that serve the 78,798 older adults who reside in Benton, Cedar, Iowa, Johnson, Jones, Linn, and Washington Counties.

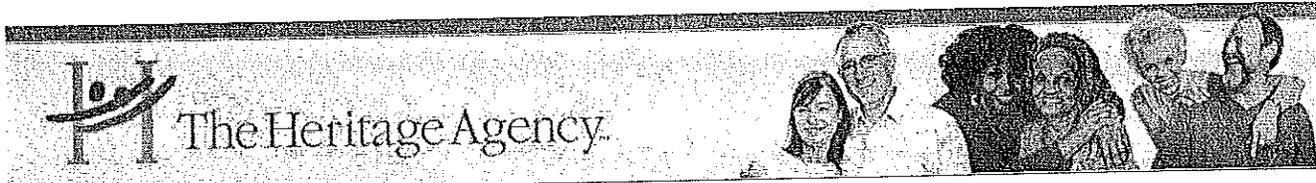
Heritage serves people age 60 and above as well as their families, communities, and governments. In addition, The Heritage Agency serves as an Aging and Disability Resource Center (ADRC) serving adults 18 years of age and older with a disability through advocacy and options counseling.

For even more information on Heritage, news, upcoming events and clips of the Heritage TV Show - The Involvement Report, please go to our online magazine at www.involvementonline.org.

Notice of Privacy Practices

The Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

HAAA-PSA 4 - SFY 2014-2015



[About Us](#) | [Meeting Schedule](#) | [Task Forces](#) | [History](#) | [Advocacy](#) | [Local Services](#) | [Funding](#) | [Planning](#) | [Publications](#) | [Links](#) | [Contact](#)

ADRC

Public Hearing Announcement

Elder Abuse Intervention

NOTICE OF PUBLIC HEARING

Nutrition RFP 2nd Release Application and Forms

ON MULTIYEAR AREA PLAN

FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

Public Hearing Announcement

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2 (7)a.(2):

Public Notice 2nd Request for Nutrition Proposals

The public is notified and invited to attend a public hearing being conducted by The Heritage Area Agency on Aging regarding the 2014-2015 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties). The purpose of this public hearing is to gather input and comments from interested parties, including priority services. The area plan will guide Heritage for the period of State Fiscal Years 2014-2015.

RFP FAQ

Case Management

The public hearing will be conducted on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to attend.

Family Caregiver Support

To ensure full compliance with Iowa Code and access to all parties, Heritage is allowing for written comments in addition to the formal public hearing. To submit written comment, interested parties may contact Heritage to request a copy of the form.

Mission

Older Iowans Fund



The Heritage Agency™

**Public Hearing
Area Plan Fiscal Year 2014 – 2015
Wednesday, March 13, 2013
12:30 – 1:30 p.m.**

The Heritage Area Agency on Aging, Building 32A
Kirkwood Community College main campus
6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa

Agenda

1. Call to order
2. Purpose of hearing
3. Public Comments on Priority Services
 - a. Written comments
 - b. Other comments
4. Services under consideration to be provided as Direct Services by Heritage
5. Adjournment

For Life After Sixty

The Heritage Agency • Aging and Disability Resource Center • Kirkwood Community College
6301 Kirkwood Boulevard SW • PO Box 2068 • Cedar Rapids, Iowa 52406
319-398-5559 • 1-800-332-5934 • Fax: 319-398-5533

www.heritageaaa.org

The Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

HAAA-PSA 4-SFY 2014-2015

**Area Plan Public Hearing
March 13, 2013**

Services Proposed to be Provided as Direct Services by Heritage

Case Management (one hour). Also referred to as direct case management services. Assistance either in the form of access to or care coordination in circumstances where the older person and/or their caregivers are experiencing diminished functioning capacities, personal conditions or other conditions or other characteristics which require the provision of services by formal service providers. Activities of case management include assessing needs, developing care plans, authorization of services, arranging services, coordinating the provision of services among providers, follow-up and reassessment, as required.

Evidence-Based Health Activities (one consumer per program). (A consumer is a person who meets the completion standard for a program.) Activities demonstrated through evaluation to be effective for improving the health and wellbeing or reducing disease, disability and/or injury among older adults; and activities ready for translation, implementation and/or broad dissemination by community-based organizations using appropriately credentialed practitioners.

Examples include: Healthy Eating for Successful Living among Older Adults, and health screenings, oral health programs and vaccinations if they meet this level of criteria. A Matter of Balance; Chronic Disease Self-Management Program (CDSMP); Chronic Pain Self-Management Program; Enhance Fitness, Tomando Control de su Salud (Spanish Chronic Disease Self-Management Program); Better Choice, Better Health – Diabetes; Tai Chi Moving for Better Balance; Program to Encourage Active Rewarding Lives for Seniors (PEARLS); Diabetes Self-Management Program; Active Living Every Day; Healthy Eating for Successful Living among Older Adults; Healthy IDEAS (Identifying Depression, Empowering Activities for Seniors); Healthy Moves for Aging Well; Medication Management Improvement System; Prevention and Management of Alcohol Problems in Older Adults; Stepping On; Strong for Life; Moving for Better Balance; Active Choices; Enhanced Wellness; Fit and Strong!; Walk with Ease; Positive Self-Management Program for HIV; Arthritis Self-Management (Self-Help) Program; Online Chronic Disease Self-Management Program; Healthier Living with Arthritis (Internet Arthritis Self-Management Program); Programa de Manejo Personal de la Artritis (Spanish Arthritis Self-Management Program) and Programa de Manejo Personal de la Diabetes (Spanish Diabetes Self-Management Program).

Health Promotion (one consumer). Services which include health screenings and assessments; organized physical fitness activities; evidence-based health promotion programs; medication management; home injury control services; and/or information, education, and prevention strategies for chronic disease and other health conditions that would reduce the length or quality of life of the person 60 or older.

Information and Assistance (one consumer contact). A service for older individuals that (a) provides the individual with current information on opportunities and services available to the individual within his community, including information relating to assistive technology; (b) assesses the problems and capacities of the individuals; (c) links the individual to the opportunities and services that are available; (d) to the maximum extent practicable, ensures that the individual receives the services needed by the individual, and are aware of the opportunities available to the individual, by establishing adequate follow-up procedures *NOTE: Information & Assistance is an individual, one-on-one contact between a service provider and an elderly consumer. An activity that involves a contact with several elderly consumers or potential consumers (group services) should not be counted as a unit of I & A.*

Money Management (one hour). Services designed to provide financial management for individuals who, at least temporarily, are unable to manage their funds in a manner that preserves the most independence and decision-making power for that individual, while ensuring that the person's basic needs continue to be met.

Options Counseling (one hour). Service of providing an interactive process where individuals receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the individual and may include others that the individual chooses or those that are legally authorized to represent the individual. Options Counseling may include but is not limited to the following: (1) A personal interview and assessment to discover strengths, values, and preferences of the individual and screenings for entitlement program eligibility, (2) a facilitated decision-making process which explores resources and service options and supports the individual in weighing pros and cons, (3) developing action steps toward a goal or a long-term support plan and assistance in applying for and accessing support options, and (4) follow-up to ensure supports and decisions are assisting the individual.

Public Information (one issue/one session). Service whereby more than one consumer is informed and/or assisted in identifying services that may be available. A newsletter could be an example of Public Information (number of issues, not copies distributed, is the service unit.)

Training/Education (one hour). Providing formal or informal opportunities for individuals to acquire knowledge, experiences or skills.

Title III E Family Caregiver and Grandparent and Other Elderly Caregivers of Children Services

Access Assistance (one consumer contact). A service that assists caregivers in obtaining access to the services and resources that are available within their communities. To the maximum extent practicable, it ensures that the individuals receive the services needed by establishing adequate follow-up procedures. [Note: Information and assistance to caregivers is an access service, i.e., a service that: (A) provides individuals with information on services available within the communities; (B) links individuals to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures. Internet web site "hits" are to be counted only if information is requested and supplied.]

Cash and Counseling (one consumer). This covers the range of services provided or paid for through allowance, vouchers, or cash which are provided to the consumer so that the consumer can obtain the supportive services which are needed.

Counseling (one session per consumer). Counseling to caregivers to assist them in making decisions and solving problems relating to their caregiver roles. This includes counseling to individuals, caregiver support and support groups, and caregiver training (of individual caregivers and families).

Information Services (one activity). A service for caregivers that provides the public and individuals with information on resources and services available to the individuals within their communities. (Note: Service units for information services are for activities directed to large audiences of current or potential caregivers such as disseminating publications, conducting media campaigns, and other similar activities.)

Public Hearing for Area Plan – FY 2014-2015

March 13, 2013

12:30 – 1:30 PM

1	Charmaine Wickware	21
2	Bob Welsh	22
3	Diana Young	23
4	Kice Brown	24
5	Heath Bringsell	25
6	Jenifer Kukan	26
7	Sony Bell	27
8		28
9		29
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19		39
20		40

Public Hearing for Area Plan – FY 2014-2015
 March 13, 2013
 12:30 – 1:30 PM

1	Chris Juett United Way 211	21	
2	Shirley Geadelmann	22	
3	Kellie Elliott-Kappas	23	
4	Ingrid Wenzel	24	
5	Tala Waters	25	
6		26	
7		27	
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20		40	

Pat Franzenburg
1317 74th Street
Belle Plaine, IA 52208

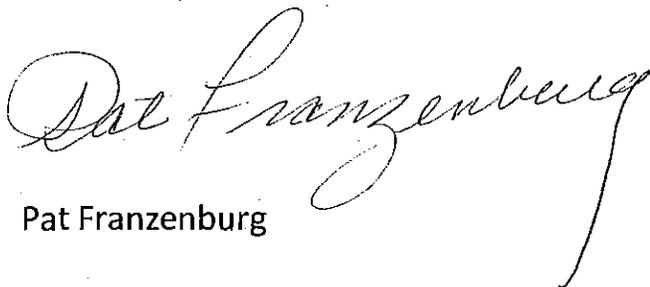
Heritage Area Agency on Aging
6301 Kirkwood Boulevard SW
PO Box 2068
Cedar Rapids, IA 52402

In reference to HAAA Area Plan 2014-2015:

Providing rural medical transportation to access health care needs continues to be a critical need for the senior population of Benton County. There are limited choices to find local medical specialist for senior care.

As our senior population continues to grow there are fewer choices available does not require travel outside our communities. If these seniors are to remain healthy in their respective homes, medical transportation is a top priority.

Yours Truly,



Pat Franzenburg

RECEIVED
FEB 25 2013
BY: _____

The Heritage Area Agency on Aging Area Plan 2014-2015 Public Input Form

The public is invited to make comment in written form or by attending a public hearing scheduled on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A (address below).

Name: _____ Edie Nebel, Public Health Administrator 

Phone: _____ 319-653-7758 _____

Address: _____ 110 North Iowa Ave, Suite 300 _____

City: _____ Washington _____ State: _____ IA _____ Zip: _____ 52353 _____

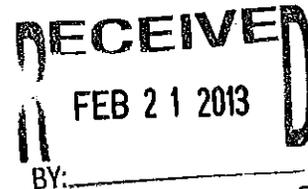
Please share what you believe are the critical needs of older adults in your community.

Washington County's older adult population has the following critical needs: transportation barriers, nutrition deficits with limited options for access, limited local resources for specialized health issues, limited mental health services access, low-income status with increased cost of living. Many of these issues are addressed for persons who qualify for the Elderly Waiver program but increased scrutiny by nurse reviewers and determinations that disqualify seniors from this resource are detrimental to the health and safety of this population. Local Case Managers, the eyes and ears of the seniors who reside in their homes, do an excellent job of assessing the situations and assisting with critical resources.

The other group of seniors that is underserved in rural Washington County is the 60 – 65 year old age group who are low-income. These persons do not qualify for many of the resources they need from Title XIX or the Waiver program, making them extremely vulnerable and unsafe in their environments. Resources that used to be available to this population in Washington County have disappeared. Washington County continues to have a high population of older adults and needs to be on the radar of Heritage into the future so that resources can be shared appropriately.

Please do not hesitate to enclose additional pages if the form does not allow you enough space! Thank you!

Mail completed form to:
The Heritage Area Agency on Aging
Attn. Ingrid Wensel
Kirkwood Community College
6301 Kirkwood Blvd. S.W.
PO Box 2068
Cedar Rapids, IA 52406



AAAA-PSA 4- SFY 2014-2015

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The Heritage Area Agency on Aging
Area Plan 2014-2015 Public Input Form

The public is invited to make comment in written form or by attending a public hearing scheduled on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A (address below).

Name: Sheila Keesey Phone: 319.333.4853

Address: 1621 E Washington St Ste #5

City: Washington State: Ia Zip: 52353

Please share what you believe are the critical needs of older adults in your community.

↳ live in their home OR apartments
↳ physical care & where to get it
↳ Maintenance repairs to their home - light bulb changes, etc
↳ routine battery changes
↳ cleaning
↳ laundry
↳ Inability to manage financial affairs
↳ Transportation is 'KEY' to assisting the elderly with (Quality of Life)!

Please do not hesitate to enclose additional pages if the form does not allow you enough space! Thank you!

Mail completed form to:
The Heritage Area Agency on Aging
Attn. Ingrid Wensel
Kirkwood Community College
6301 Kirkwood Blvd. S.W.
PO Box 2068
Cedar Rapids, IA 52406

The Heritage Area Agency on Aging Area Plan 2014-2015 Public Input Form

The public is invited to make comment in written form or by attending a public hearing scheduled on Wednesday, March 13, 2013 from 12:30 p.m. to 1:30 p.m. at The Heritage Area Agency on Aging, Building 32A (address below).

Name: Samantha Bacon Phone: 319-330-2787

Address: 1621 E. Washington St Suite 5

City: Washington State: IA Zip: 52353

Please share what you believe are the critical needs of older adults in your community.

Transportation to Drs visits that does not just drop them off and waits for a call back. Some people can wait hours before the bus will come back to pick them up. That is very tiring for the elderly population and discourages them from attending Drs. visits.

Please do not hesitate to enclose additional pages if the form does not allow you enough space! Thank you!

Mail completed form to:
The Heritage Area Agency on Aging
Attn. Ingrid Wensel
Kirkwood Community College
6301 Kirkwood Blvd. S.W.
PO Box 2068
Cedar Rapids, IA 52406

AREA PLAN – PUBLIC HEARING March 2013 by Bob Welsh

Planning

To conduct an annual electronic survey, in the seven-county area, to help identify the most critical needs of seniors.

To conduct informational forums for elected officials and citizens.

To explore partnerships with governmental departments, agencies and organizations.

Funding

To distribute state and AOA funding to qualified providers based on planning priorities.

To explore and secure additional funding opportunities.

Advocating

Encourage members to: a) actively participate in groups such as: Older Iowans legislature and AARP Iowa, b) subscribe to Aging Watch, c) attend legislative forums in their county, d) contact their legislative leaders.

Provide transportation, (usually by bus) to the State Capital for i4a (Iowa Association of Area Agencies) day on the Hill for all interested persons and at key times (usually by van) to advocate committee members during the legislative session.

Provide legislative updates at all Task Force Meetings and if possible include these on the Heritage web site.

Action

Serving as the Aging and Disability Resource Center (ADRC) in the seven-county area, providing: Informational and Referral, Option Counseling and Case Management, administering the Elder Abuse Initiative, the Substitute Decision Maker Program and other federal, state, or regional programs aimed at meeting the needs of the aging and disability community.

Values important to Heritage include:

- 1) Enable older Iowans and their families to make informed decisions about, and being able to easily access home and long-term care options.
- 2) Enable seniors 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 support for caregivers.
- 3) Empower older Iowans and persons with disabilities to stay active and healthy through Older Americans Act services including evidenced based prevention programs.
- 4) Ensure the rights of older Iowans and prevent their abuse, neglect and exploitation.

**Public Hearing for Fiscal Year 2014 – 2015 Area Plan
Hearing Minutes/Summary
Wednesday, March 13, 2013
12:30 – 1:30 p.m.**

The Heritage Area Agency on Aging, Building 32A, Cedar Rapids, Iowa

Public comment in italics.

Present: Shirley Geadelmann, Chris Juett, Charmaine Wickwire, Bob Welsh, Dianna Young, Kice Brown, Heather Binggeli, Zach Kakac.

Staff Present: Ingrid Wensel, Tala Waters, Kellie Elliott-Kapparos

1. Call to order at 12:30 pm by Ingrid Wensel, Executive Director.

Ms. Wensel welcomed everyone to Heritage and thanked them for being a part of the area plan process by attending and participating in the formal public hearing. She added that attendees' dedicated feedback helps Heritage to better understand what services are needed and should be a priority to help older adults to maintain their independence in the community. Ms. Wensel briefly discussed the area plan timeline and the agenda.

2. Purpose of hearing

Ms. Wensel restated the purpose of today's hearing as help our organization to better understand what the priority services need to be in our community, to help maintain the dignity and independence older adults living at home in our community.

3. Public Comments on Priority Services

- a. Written comments. Written comments that were submitted to Heritage in advance of the public hearing were read by Tala Waters. A brief summary highlighting the main point of those written comments were (copies of complete comments are attached to this summary):
 - i. *Pat Franzenburg from Benton County commented that providing rural medical transportation to access health care needs continues to be a critical need for the senior population.*
 - ii. *Edie Nebel from Washington County commented that Washington County's older adult population has the following critical needs: transportation barriers, nutrition deficits with limited options for access, limited local resources for specialized health issues, limited mental health services access, low-income status with increased cost of living. Low income older adults between the ages of 60-65 are also underserved due to limited programs they are qualified to access.*
 - iii. *Sheila Kelsey from Washington County commented that needs exist for assistance in the home or apartment for physical cares, maintenance repairs, light bulb and battery changes, cleaning, laundry, managing finances, and transportation.*
 - iv. *Samantha Bacon from Washington County commented that transportation to doctor visits is needed.*

- b. Other comments.

Ms. Wensel noted that the comments read are those that Heritage has received so far. Ms. Wensel stated that attendees are not required to give a comment today, but she wanted to ensure that all had an opportunity to speak. Ms. Wensel addressed attendees individually.

Dianna Young stated that an issue her organization experiences with congregate dining sites is program participants experiencing a transportation barrier in getting to the site. She believed if transportation was available, people would participate more as opposed to receiving a home delivered meal.

Charmaine Wickwire echoed the written comments submitted by Pat Franzenburg in relation to the need for transportation.

Ms. Wensel asked for clarification if the need for transportation included the need for an attendant or escort as described through the taxonomy of assisted transportation.

Ms. Wickwire stated the greatest need is for assisted transportation. She also discussed the importance of the bonding process between the older adult in need of service with volunteers, many of whom are seniors also, thus having mutual benefits to participating in the program.

Kice Brown also noted that transportation is important in rural areas.

Ms. Wensel stated that hearing more than one voice sharing the same issues is fine and helpful in determining needs and priorities.

Bob Welsh began his comments with how he would write the area plan if it was his task with a focus on the Heritage mission of planning, funding and advocacy. He would also add a fourth section as action. Mr. Welsh prepared a handout in advance of the public hearing and distributed it to attendees (copy attached). He reviewed the handout while providing comment. A summary of the points addressed by Mr. Welsh in addition to the handout he distributed were: the need to gather information on needs to share with partners that are working together to address needs through tools like electronic surveys, more partners that can be linked together is best, expressed opposition to silo funding and that coordinated approach to services should all align under the Aging and Disability Resource Center (ADRC). Mr. Welsh also stated his belief that the current area plan identifies four critical issues and those should be retitled as values in the new area plan (listed on the handout), and a fifth to be added to "ensure quality care in institutional settings." Mr. Welsh also discussed the Unmet Needs study done by the University of Northern Iowa which identified top needs as outdoor chore services, assistance with government programs, and indoor chore services. Mr. Welsh also stated that the Johnson County Task Force on Aging stated that they believe the top needs to be transportation, chore and meals. He further echoed the need for transportation and used this as an example of the need to explore partnerships, advocate for state funding for transportation and to seek out grants.

Mr. Welsh and Mr. Brown agreed that isolation is a high risk factor and that social interaction is important.

Chris Juett commented that she like Mr. Welsh's idea of an electronic survey. A general discussion regarding information or data that United Way 2-1-1 systems can gather and potentially share as needs that they can identify. Ms. Juett's experience based on calls from people 60 years of age and older to 2-1-1 reflects needs in housing, income assistance, food and healthcare. She also stated that in fiscal year 2012, their number three unmet need was transportation. That was overall and not age specific and could include other things, such as auto repair needs, but the fact that it was the third most called about area of need reflects comments made.

Mr. Welsh asked what reports 2-1-1 currently provides to Heritage through the current contractual relationship. General discussion on reporting and data analysis occurred.

Ms. Wensel added that reports, task force, other funders, partners, public hearings like today, and others methods are all ways or tools that Heritage uses in planning.

Ms. Juett stated how her organization appreciates the partnership with Heritage and that they are committed to continuing the conversation to benefit the community.

General discussion among attendees occurred regarding taxonomy definitions, the variety of definitions and types, in addition to databases associated with information and referral. Ms. Wensel stated that this is a huge issue and that there is work happening at all levels with a variety of people to work to address the problem and her hope is that we all would use the same taxonomy language and equitable/compatible databases. This would facilitate better information gathering, determining needs, and better planning to address unmet and emerging needs.

Heather Binggeli shared a comment her organization received regarding the Elder Services transportation program. The client had expressed appreciation for the door through door transportation service because they now know that they will have enough oxygen to get to and home from their appointment.

General discussion of how this comment from a client demonstrated the importance of transportation services followed.

4. Services under consideration to be provided as Direct Services by Heritage

Ms. Wensel asked attendees to reference the handout (attached) titled "Services Proposed to be Provided as Direct Services by Heritage" and that Heritage would be accepting comments on this issue until March 31, 2013.

The handout listed case management, evidence-based health activities, health promotion, information and assistance, money management, options counseling, public information, training/education; and under Title III Family Caregiver and Grandparent and Other Elderly Caregivers of Children Services, access assistance, cash and counseling, counseling, and information services.

Ms. Wensel stated that all services listed are currently provided and performed by Heritage staff directly and in some cases also subcontracted, but that all services listed would be considered as direct service by Heritage. These services currently done internal do not represent a change at Heritage, but they are to be reviewed with the new area plan.

Ms. Wensel read through the handout and provided an example of each service as performed by Heritage.

Mr. Welsh commented on the title of the handout.

Ms. Wensel clarified that as part of the public hearing process, Heritage is seeking feedback on the services Heritage is planning to do direct with the new area plan. Some services are required as an area agency on aging to be done by the area agency on aging.

Tala Waters added that Heritage does subcontract for many services that are not included on the handout, but the handout represents the services to be done internally, directly.

Ms. Wensel added that through the area plan and public hearing process, Heritage intends to demonstrate what services would be done in-house and gather feedback from interested parties regarding services Heritage would do direct.

General discussion occurred regarding the Direct Services Form that is to be completed with the area plan submission to the Iowa Department on Aging. During this discussion, "IDA" was used and an attendee asked what that meant, Ms. Wensel apologized and clarified that IDA was for the Iowa Department on Aging. She also gave a brief explanation of how Heritage is associated with the Iowa Department on Aging.

Mr. Brown asked what types of evidenced based programing Heritage does based on the taxonomy definition. Ms. Waters and Ms. Wensel responded by describing the Chronic Disease Self Management Program activities performed by Heritage and through partnerships.

Mr. Welsh asked if direct services would need to be conducted or administered at the Heritage office or service strategy include partnerships. In summary, Ms. Wensel clarified that Heritage serves a seven county region and that "internal" does not mean only at one location.

Ms. Wensel commented that feedback is always solicited and welcome.

The public hearing was officially adjourned by Ms. Wensel at 1:30 p.m.

Respectfully submitted,

Kellie Elliott-Kapparos

Operations Director

This meeting was taped recorded.

Attachment 18: Governing Body Signatures Explanation

The Heritage Area Agency on Aging is a department of Kirkwood Community College operating as an Area Agency on Aging. As such, Heritage is a "separate organizational unit within a multi-purpose agency which functions only for purposes of serving as the area agency on aging", therefore, satisfying 45 C.F.R. §1321.55.

The Kirkwood Community College Board of Directors (Trustees) is the legal entity for The Heritage Area Agency on Aging. As a group, the Board of Trustees is charged with setting policy for the college and ensuring the effectiveness of the institution by monitoring and evaluating strategic initiatives and financial direction of the college. The Board of Trustees has assigned staff of Kirkwood Community College to provide support. Jim Choate, Vice President and Chief Financial/Operation Officer is assigned as Treasurer and Sheryl Cook, Executive Secretary to the President also serves as Board Secretary.

The Trustees acknowledge that Heritage is a separate organizational unit existing within Kirkwood Community College and that Heritage is governed by an Advisory Council. Although Kirkwood through its Board of Trustees has ultimate authority over the departments of the college, including Heritage, Kirkwood recognizes the autonomy of Heritage's Executive Director and Advisory Council to exercise all the necessary functions under the Older Americans Act and Iowa law.

Upon approval of the Heritage Advisory Council, Kirkwood Community College Board of Trustees or their Designee (Jim Choate) review the Area Plan and associated subcontractual agreements with the Heritage Executive Director. Final authorization rests within the legal relationship and structure of The Heritage Area Agency on Aging/Kirkwood Community College organizational oversight and departmental agreement.

The Executive Director of Heritage, Ingrid Wensel, reports to the Kirkwood Community College Vice President and Chief Financial/Operations Officer, Jim Choate, who reports to Dr. Mick Starcevich, President of the college, and ultimately the Kirkwood Community College Board of Trustees. Tala Waters is the Fiscal Director of Heritage and authorized to sign fiscal reports for Heritage.