

**Milestones Area Agency on Aging
PSA #5**

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



**Submission Date: May 1, 2015
Effective Date: July 1, 2015**

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Executive Summary

Milestones Area Agency on Aging serves area 5 and covers 17 counties in the eastern/southeastern portion of the state. We serve Appanoose, Clinton, Davis, Des Moines, Henry, Jefferson, Keokuk, Lee, Louisa, Lucas, Mahaska, Monroe, Muscatine, Scott, VanBuren, Wapello and Wayne Counties. Our demographics consist of approximately 120,000 seniors and 8,251 square miles. Some statistics from last fiscal year include (all numbers are rounded);

61 nutrition service centers
278,000 home delivered meals
188,000 congregate meals
17,000 sessions of nutrition education
6900 seniors served nutrition
1800 case management clients
22,000 case management hours
1700 family caregiver contacts
330 counseling sessions
1700 hours of respite
20,000 outreach contacts
And many more.....

Milestones has contracts with numerous providers that assist in providing a variety of services throughout the region. This information is detailed on pages 33 & 34 of this plan.

We employ approximately 200 staff with the majority, a little over 100, being employed within the nutrition program. Our nutrition program has some cooking kitchens and some contracted meals depending on the county.

Milestones has strong evidenced based programming with two Master trainers on staff and numerous other coach trainers available to teach Matter of Balance and Better Choices/Better Health. We teach classes within senior housing facilities, in assistance with community organizations and within our senior nutrition centers.

Our Family Caregiver program has two staff members that participate in some counseling sessions and assisting with the needs of caregivers within the community. We finished our 5th annual Family Caregiver Conference this year which was a huge success.

Our Case Management program has approximately 1400-1500 active clients at any give time. Each full time Case Manager has a caseload of 55-65 clients.

Our focus in the next couple years will be on:

- Expansion of the Lifelong Links Program
- Expansion of Community partners in all programming areas

Managed Care

Developing a fee for service / private pay set up for individuals

Developing creative and innovative ways to increase interest and participation within our nutrition program.

Expansion of our Evidenced Based programming

Section 1: 2016-2017 Goals and Strategies

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

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

***Focus Area:** LifeLong Links*

Strategy: Expansion Activities

Milestones has been working diligently to get the LLL project off the ground and running. The partnerships continue to be developed within the project and staff is continuing to learn their roles within the program. The focus has been on educating community members on the mission and goals of Lifelong Links as well as developing strong partnerships within the community to ensure the success of the program. We continue to develop our phone system to allow for the best data to be collected in regards to serving those that call into our 800 number. Marketing has also been a big focus within our region to get the information out and educate community members on the services being provided.

Individuals to Be Served

The table below lists the number of individuals served in SFY2015 to date from all funding sources and estimated number to be served in SFY 2016 (7/1/2015 – 6/30/2016).

Table 1: LifeLong Links Consumers Served

Category	SFY 2015 [as of date]	SFY 2016
Total Number of LifeLong Links IR&A consumers	507	1800
IR&A Consumers Served Aged 60+	383	1250
IR&A Consumers who are Caregivers	163	400
IR&A Consumers Between 18 and 60 with a Disability	91	500
Total Number of LifeLong Links Options Counseling Consumers	122	576
Options Counseling Consumers Aged 60+	93	300
Options Counseling Consumers who are Caregivers	0	24
Options Counseling Consumers Between 18 & 60 with a Disability	19	252

[source for table data.]

Innovative Funding

Milestones plans to continue to develop a plan for a fee for service model, in collaboration with the other AAA's in the state. Currently, research is being done to ensure that the model implemented is cohesive with our mission while still meeting the needs of the clients and their families.

Partnerships

Partnerships have been developed with local mental health, public health, Centers for Independent living, Hope Haven, VISTA, veterans and many other local community members. All of these organizations are represented on the Advisory Board for the LLL Project.

Projected Expenditures

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

Table 2: LifeLong Links Funding Sources

Funding Source	FY2015	FY2016
Federal	218,935	85,527
State	132,078	257,722
Local		
In-Kind		
Total	351,013	343,249

This includes ADRC, Options counseling and I & A

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

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

Focus Area 1: Transportation

Transportation Needs

Milestones has fairly strong transportation providers that cover the entire region. The biggest barrier would be in our extreme rural counties where there is not a provider or very few options for transportation. Our needs are focused on availability of transportation services. It is difficult for seniors with scheduling their rides. They also struggle with options if they want to go to multiple locations on one outing. Many providers do not accommodate this option.

Strategies to Address Transportation Needs

We continue to work with the transportation providers that we currently have contracts within our area. Milestones contracts with three major providers of transportation; 10-15 in the Ottumwa region covering 10 counties, Southeast Iowa Transit in the Burlington region covering 4 counties and RiverBend Transit in the Davenport region covering three counties. We also have two smaller contracts with Friendly House in Scott County and the Diversity Center in Muscatine County. These contracts allow for assistance in transporting seniors to our nutrition service centers. With those clients that are receiving Case Management under the Elderly Waiver there are more options available with smaller providers that can meet their needs.

Individuals to be Served

The table below lists the number of individuals served in SFY2015 to date from all funding sources and estimated number to be served in SFY 2016 (7/1/2015 – 6/30/2016).

Table 3: Transportation Consumers

Category	SFY2014	SFY 2015 As of: 12/31/2014	SFY 2016
Number of Transportation Units (one-way trips) Provided	27,057	16,163	29,095
Estimated Number of Transportation Consumers Served	27,057	16,163	2,425

[IAPRS]

Projected Expenditures

The table below lists budgeted expenditures from all funding sources to support this effort.

Table 4: Transportation Funding Sources

Funding Source	FY2015	FY2016
Federal	145,636	159,754
State	4,577	4,710
Local	37,500	18,850
In-Kind		
Total	187,713	183,314

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

Caregiver Needs

The number one reason they contact us is to access help in finding resources for the person they are taking care of as well as themselves. They want to know how to access the resources and to find assistance in covering the cost. Many of the caregivers are overwhelmed because they are still working and trying to take care of their own families. Many people think that the AAA can actually put people into nursing homes so we clarify that and offer them alternatives for assistance. Our Caregiver Specialists refer many people to Iowa Legal Aid for legal assistance. The biggest needs seen with caregivers would be; home repairs and help with the cost of those repairs, chore services and transportation issues.

Milestones provides support groups and teaches Powerful Tools for Caregivers. We continue to research options for Caregivers and look at different ways to help them.

We will continue to focus on our current ways of addressing the issues and expand opportunities when we can. We will be looking at ways to expand our support groups to more counties.

The barrier that affects us from addressing issues is always funding. We need more money to assist with respite, home repairs, and transportation and chore services to provide Caregivers what they need.

Individuals to be Served

The table below lists the number of individuals served in SFY2015 to date from all funding sources and estimated number to be served in SFY 2016 (7/1/2015 – 6/30/2016).

Table 5: Caregiver Consumers

Category	SFY 2015 As of: 12/31/2014	SFY 2016
Total Number of Caregiver Consumers Served	13,263	25,764

[IAPRS.]

Additional Services

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

Category	SFY 2015 As of: [date]	SFY 2016
Percent of caregivers served receiving more than one AAA service	unknown	

Projected Expenditures

The table below lists budgeted expenditures from all funding sources to support this effort.

Table 7: Caregiver Funding Sources

Funding Source	FY2015	FY2016
Federal	283,056	237,016
State	7,772	9,099
Local	2,500	
In-Kind		
Total	293,328	246,115

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

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

Focus Area: *Food Security Project*

Nutrition Needs

In SFY 2015, Area Agencies on Aging received a special appropriation to address food insecurity needs of older lowans. Each agency committed to developing innovative strategies to address food insecurity among older lowans and the decreasing participation in the Congregate Meal and Home Delivered Meal programs.

Milestones feels as though the biggest barrier is the options available to them through the nutrition centers versus what is available to them in the community. This is especially true in our larger communities where access and availability of options is easy for them. In some location it is the location of the nutrition center. Transportation is an issue in some rural locations.

SFY2015 Strategies

1. FIG Project
2. Fresh Conversations
3. Promotional materials in local papers, water utility bills, etc.
4. Engaged in numerous community interagency meetings
5. Activities at nutrition centers
6. Mayor visits and presentations

We have seen a huge increase in participation due to any of the above strategies.

SFY2016 Strategies

Milestones plans to continue with the strategies we have tried in the previous year. We also hope to add different variety to the menus. We are looking at adding a theme monthly meal, chosen by the seniors, at different locations. We would like to work with the seniors to see what they want and develop strategies to address those wants.

The FIG project has allowed a more flexible choice in the area provided. We would like to work with i4a in marketing nutrition programs statewide. We need to change our mindset about “seniors” because we have a whole new group of people in this age group that wants and needs different things that the same age group did 20 years ago. Until we address this, we will continue to see a decline in the congregate and home delivered meal programs. We need more options and more “excitement” within the program without so many restrictions.

Individuals to be Served

The table below lists the number of individuals served in SFY2015 to date from all funding sources and estimated number to be served in SFY 2016 (7/1/2015 – 6/30/2016).

Table 8: Meal Program Consumers

Category	SFY 2015 As of: 12/31/2014	SFY 2016
Total Number of Meal Program Consumers Served	4,263	8,000

[IAPRS.]

Additional Services

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

Category	SFY 2015 As of: [date]	SFY 2016
Percent of meal program consumers served receiving additional AAA services	unknown	

[source for table data.]

Projected Expenditures

The table below lists budgeted expenditures from all funding sources to support this effort.

Table 10: Meal Programs Funding Sources

Funding Source	FY2015	FY2016
Federal	1,434,260	1,363,571
State	980,931	959,871
Local	670,976	654,007
In-Kind		
Total	3,086,167	2,977,449

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

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

Focus Area: *Elder Abuse Prevention and Awareness*

Prevention and Awareness Needs

1. Financial Exploitation
2. Self denial of critical care (self-neglect)
3. Denial of critical care (neglect by a caregiver) / physical abuse

Strategies to Address Needs

We provide resources and options for the people affected. We have worked with other agencies and within our own agency to continue to provide services long term in order to ensure that needs are being addressed.

We plan to continue to expand resources and collaborative efforts. We will focus on providing more training and education within the community.

Funding is an area that is a barrier in addressing the needs. Another barrier is that, as AAA staff, we are sometimes powerless in what we can do.

Individuals to be Served

The table below lists the number of individuals served in SFY2015 to date and an estimated number to be served in SFY 2016 (7/1/2015 – 6/30/2016).

Table 11: Elder Abuse Prevention and Awareness Consumers

Category	SFY 2015 As of: 3/2015	SFY 2016
Total Number of EAPA Active Consumers Served	4	16

Additional Services

Table 12: Percentage of EAPA consumers receiving additional AAA services

Category	SFY 2015 As of: [date]	SFY 2016
Percent of EAPA consumers receiving additional AAA services	unknown	

Projected Expenditures

The following table lists budgeted expenditures from all funding sources to support this effort.

Table 13: EAPA Funding Sources

Funding Source	FY2015	FY2016
Federal	87,500	58,728
State		
Local		
In-Kind		
Total	87,500	58,728

Section 2: Service Planning and Evaluation

FY 2016 Projected Older Americans Act Consumers and Service Units

Report Form 3A-1

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Iowa Department on Aging	Agency Admin	Consumers	Rosters	Aggregate Services	FSRs	Reports
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IAFRS Menu	Form 3A-1	Milestones Area Agency on Aging	FY 2016
		This report has NOT been finalized	Budget Report, Version 1
Form 3A-1			

SERVICE	General Aging	Service Units Provided	Consumers Served	60+ Rural	60+ Minority	60+ Minority Below Poverty	60+ Below Poverty	SLP Low Income	SLP Moderate Income
D1A: Administration	General Aging								
	Caregiver								
1: Personal Care	General Aging								
2: Homemaker	General Aging	3,381	199	185	22	19	138		
3: Chore	General Aging	1,815	46	46	10	8	45		
4: Home Delivered Meals	General Aging	153,270	3,169	104	169	20	518		
5: Adult Daycare	General Aging	37,948	120	4	20	15	70		
6: Case Management	General Aging	5,540	1,078	52	84	10	258		
7: Congregate Meals	General Aging	172,214	3,190	153	249	28	762		
8: Nutrition Counseling	General Aging	20	20	7	1		2		
9: Assisted Transportation	General Aging								
10: Transportation	General Aging	29,095	2,425	116	189	23	580		
11: Legal Assistance	General Aging	1,466	535	26	42	5	128		
12: Nutrition Education	General Aging	23,160	4,561	219	356	43	1,090		
13: Information & Assistance	General Aging	1,000	800	38	62	7	192		
14: Outreach	General Aging	18,754	18,754	272	779	336	934		
B02: Health Promotion & Disease Prevention	General Aging	12,062	2,773	164	208	25	692		
	B03: Respite								
	B05: Mental Health Outreach								
	B07: Evidence Based Health Activities	General Aging	176	176	8	14	2	42	
	C01: Advocacy	General Aging							
	C05: Legal Education	General Aging							
	C07: EAPAP Consultation	General Aging	160	16	10	1	4		
	C08: EAPAP Assessment & Intervention	General Aging	30	10	7	1	2		
	C09: EAPAP Training & Education	General Aging	500	350	315	27	84		
	C10: Self-Directed Care	General Aging							
	C11: Money Management	General Aging							
	D01: Training & Education	General Aging							
	D02: Recreation Activities	General Aging							
	D03: Reassurance/Visiting	General Aging	119	119	6	9	28		
	E01: Counseling	General Aging							
	E02: Placement Services	General Aging							
	E03: Assessment & Intervention	General Aging							
	E05: Options Counseling	General Aging	576	852	27	43	132		
	F02: Material Aide	General Aging	412	412	20	32	98		
	F03: Public Information	General Aging	670	16,920	811	1,318	4,040		

F05: Volunteer Support	General Aging						
CG1: CG Access Assistance	Caregiver	1,258	818	39	64	8	195
CG2: CG Self-Directed Care	Caregiver	1	1	1	1	1	1
CG3: CG Counseling	Caregiver	398	182	10	15	1	43
CG4: CG Information Services	Caregiver	40	24,672	1,184	1,924	231	5,897
CG5: CG Respite	Caregiver	660	41	41	5	3	26
CG6: CG Supplemental Services	Caregiver	1	1	1			
CG7: CG Home Delivered Meals	Caregiver						
CG8: CG Options Counseling	Caregiver	24	12	1	1		3
GO1: GO Access Assistance	Caregiver	2	2				
GO2: GO Self-Directed Care	Caregiver						
GO3: GO Counseling	Caregiver	296	35	5	3	3	31
GO4: GO Information Services	Caregiver						
GO5: GO Respite	Caregiver						
GO6: GO Supplemental Services	Caregiver						
GO7: GO Home Delivered Meals	Caregiver						
GO8: GO Options Counseling	Caregiver						

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Service Activity and Data Collection Performance

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

Results: Service Data for FY2014 and FY2015 YTD

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

Mandatory Service	data category	SFY 2014 Projected	SFY 2014 Actual	2014 % Difference	SFY 2015 Projected	SFY 2015 Actual (YTD Q1)	2015 % Difference
Case Management	Consumers	1,389	1,814	131%	1,915	1,466	77%
	Units	7,140	21,785	305%	22,324	4,915	22%
Congregate Meals	Consumers	3,383	3,711	110%	3,727	2,229	60%
	Units	183,177	183,062	100%	186,908	44,721	24%
Health Promotion	Consumers	86	1,293	1503%	7,162	896	13%
	Units	379	9,294	2452%	7,566	2,864	38%
Home Delivered Meals	Consumers	1,108	1,533	138%	1,521	857	56%
	Units	137,174	150,537	110%	152,390	37,872	25%
Information & Assistance	Consumers	2,163	1,029	48%	1,676	229	14%
	Units	2,538	1,590	63%	1,676	294	18%
Legal Assistance	Consumers	570	593	104%	515	154	30%
	Units	1,074	1,810	169%	995	429	43%
Nutrition Counseling	Consumers	20	1	5%	20	0	0%
	Units	20	1	5%	20	0	0%
Nutrition Education	Consumers	25,836	1,776	7%	16,002	1,392	9%
	Units	22,736	16,854	74%	16,002	5,742	36%
Options Counseling	Consumers				300	17	6%
	Units				400	32	8%

Note: Options Counseling was not a mandatory service until January 2014.

Results: Consumer Data Collection

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

The table below contains the agency's intake form completion rate for SFY2014 and for the first quarter of SFY 2015.

Congregate Meal Consumers	SFY2014	SFY2015 YTD
# Consumers	3,711	2,229
# Forms Completed	3,640	2,221
% of Consumers Registered	98%	100%

Discussion: Service Projections and Data Collection

We don't feel as though we struggle to determine data for Milestones. Each year we review previous data and develop our plan as to how we can increase those numbers in projecting for the future. The biggest difficulty would come into play with new programs and developing a plan for data but in those cases we mainly wait for our baseline data to determine future plans. We work in collaboration with our service providers to determine data based on funding received and previous year information. We do this with annual on-sites to each location and one on one meeting with the providers to discuss this information in detail.

In addition to our normal data collection with intake forms we also utilize surveys and questionnaires to determine next steps within a program.

We are conservative in planning for the future and take into account staffing availability and funding.

Section 3: Intent / Assurances

Verification of Intent

Milestones (AAA) accepts full authority and responsibility to develop and administer the SFY 2016-SFY 2017 Area Plan on Aging in accordance with all requirements of the Older Americans Act as amended 2006, state laws, rules, and procedures. By accepting this authority and responsibility, the area agency agrees to develop and administer the Area Plan for a comprehensive and coordinated system of service and to serve as the advocate and focal point for all lowans 60+ years of age in the area agency's planning and service area.

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

The Governing Body has reviewed and approved the SFY 2016-SFY 2017 Area Plan on Aging, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Print Name: Dorothy Goldizen

Dorothy Goldizen 28 April 15
Signature, Chair - Governing Body Date Signed

The Advisory Council has reviewed and approved the SFY 2016-SFY 2017 Area Plan on Aging, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Print Name: Robert Waugh Jim Howell, Vice Chair
Jim Howell 4-28-15
Signature, Chair – Advisory Council Date Signed

The Executive Director has reviewed and approved the SFY 2016-SFY 2017 Area Plan on Aging, and hereby submits the Area Plan to the Iowa Department on Aging for approval by the Iowa Commission on Aging.

Print Name: Christa Merritt
Christa Merritt 4-28-15
Signature, Executive Director Date Signed

Authorized Signatures

Name of Area Agency on Aging: Milestones
Street Address: 935 E 53rd Street
City, State, Zip Code: Davenport IA 52807

Type of Agency: Area Agency on Aging
Date of Area Agency on Aging Designation: March 19, 2013

Authorized Signatures for Funding Applications and Contracts

Print Name: Christa Merritt

Christa Merritt

Signature of Executive Director

4/28/15

Date Signed

Print Name: Dorothy Goldizen

Dorothy Goldizen

Signature of Chair, Governing Body

28 April 15

Date Signed

Authorized Signatures for Fiscal Reports

Print Name: Christa Merritt

Christa Merritt

Signature of Executive Director

4/28/15

Date Signed

Print Name: Dorothy Goldizen

Dorothy Goldizen

Signature of Chair, Governing Body

28 April 15

Date Signed

Print Name: Tina Jaegers

Tina L. Jaegers

Signature of Fiscal Director

4/28/15

Date Signed

Authorized Signatures for Program Reports

Print Name: Christa Merritt

Christa Merritt

Signature of Executive Director

4/28/15

Date Signed

Print Name: Tina Jaegers

Tina L. Jaegers

Signature of Fiscal Director

4/28/15

Date Signed

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

Sec. 306, AREA PLANS

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

income- minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; and (III) meet specific objectives established by the area agency on aging, for providing services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area; and

- 306(a)(4)(A)(iii) With respect to the fiscal year preceding the fiscal year for which such plan is prepared, each area agency on aging shall--(I) identify the number of low-income minority older individuals and older individuals residing in rural areas in the planning and service area; (II) describe the methods used to satisfy the service needs of such minority older individuals; and (III) provide information on the extent to which the area agency on aging met the objectives described in clause (a)(4)(A)(i).
- 306(a)(4)(B)(i) Each area agency on aging shall provide assurances that the area agency on aging will use outreach efforts that will identify individuals eligible for assistance under this Act, with special emphasis on-- (I) older individuals residing in rural areas; (II) older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);(III) older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas); (IV) older individuals with severe disabilities;(V) older individuals with limited English proficiency; (VI) older individuals with Alzheimer's disease and related disorders with neurological and A-3 organic brain dysfunction (and the caretakers of such individuals); and (VII) older individuals at risk for institutional placement; and
- 306(a)(4)(C) Each area agency on agency shall provide assurance that the area agency on aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas.
- 306(a)(5) Each area agency on aging shall provide assurances that the area agency on aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement, with agencies that develop or provide services for individuals with disabilities.
- 306(a)(6)(F) Each area agency will: in coordination with the State agency and with the State agency responsible for mental health services, increase public awareness of mental health disorders, remove barriers to diagnosis and treatment, and coordinate mental health services (including mental health screenings) provided with funds expended by the area agency on aging with mental health services provided by community health centers and by other public agencies and nonprofit private organizations;

- 306(a)(9) Each area agency on aging shall provide assurances that the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 307(a)(9), will expend not less than the total amount of funds appropriated under this Act and expended by the agency in fiscal year 2000 in carrying out such a program under this title.
- 306(a)(11) Each area agency on aging shall provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as "older Native Americans"), including-
- 306(a)(11)(A) information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, an assurance that the area agency on aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under this title;
- 306(a)(11)(B) an assurance that the area agency on aging will, to the maximum extent practicable, coordinate the services the agency provides under this title with services provided under title VI; and
- 306(a)(11)(C) an assurance that the area agency on aging will make services under the area plan available, to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans.
- 306(a)(13)(A) Each area agency on aging shall provide assurances that the area agency on aging will maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships.
- 306(a)(13)(B) Each area agency on aging shall provide assurances that the area agency on aging will disclose to the Assistant Secretary and the State agency—
- 306(a)(13)(B)(i) the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals; and
- 306(a)(13)(B)(ii) the nature of such contract or such relationship.
- 306(a)(13)(C) Each area agency on aging shall provide assurances that the area agency will demonstrate that a loss or diminution in the quantity or quality of the services provided, or to be provided, under this title by such agency has not resulted and will not result from such non-governmental contracts or such commercial relationships.
- 306(a)(13)(D) Each area agency on aging shall provide assurances that the area agency will demonstrate that the quantity or quality of the services to be provided under

this title by such agency will be enhanced as a result of such non-governmental contracts or commercial relationships.

- 306(a)(13)(E) Each area agency on aging shall provide assurances that the area agency will, on the request of the Assistant Secretary or the State, for the purpose of monitoring compliance with this Act (including conducting an audit), disclose all sources and expenditures of funds such agency receives or expends to provide services to older individuals.
- 306(a)(14) Each area agency on aging shall provide assurances that funds received under this title will not be used to pay any part of a cost (including an administrative cost) incurred by the area agency on aging to carry out a contract or commercial relationship that is not carried out to implement this title.
- 306(a)(15) provide assurances that funds received under this title will be used-
- 306(a)(15)(A) to provide benefits and services to older individuals, giving priority to older individuals identified in paragraph (4)(A)(i); and
- 306(a)(15)(B) in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;

Section 4: Stakeholder / Public Input

Governing Body for Milestones

Chair

Name: Dorothy Goldizen
Address: PO Box 43
City & Zip Code: Pulaski 52584
County: Davis
Phone: 641-675-3643
E-mail: N/A
Term Expires: 6/30/15

Secretary/Secretary Treasurer

Name: Lynelle Diers
Address: 108 East Main
City & Zip Code: Ottumwa 52501
County: Wapello
Phone: 641-682-5434
E-mail: wcph@pcsia.net
Term Expires: 6/30/16

Other Members

Name: Bill Thom
Address: 205 South 10th
City & Zip Code: Centerville 52544
County: Appanoose
Phone: 641-856-2505
E-mail: billyt9@mchsi.com
Term Expires: 6/30/17

Name: Lee Mc Clure
Address: 1715 N 4th Street
City & Zip Code: Clinton 52732
County: Clinton
Phone: 563-357-2040
E-mail: jlmc1715@hotmail.com
Term Expires: 6/30/15

Name: Stephen Swisher
Address: 3324 Forest Road
City & Zip Code: Davenport 52807
County: Scott
Phone: 563-359-3289
E-mail: Swisher62169@aol.com
Term Expires: 6/30/17

Vice-Chair

Name: Bob Howard
Address: 802 Iowa Ave
City & Zip Code: Muscatine 52761
County: Muscatine
Phone: 563-263-3307
E-mail: howardforboss@gmail.com
Term Expires: 6/30/16

Treasurer (if separate officer)

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

Name: Jeri Dean
Address: 1704 East Ashford Avenue
City & Zip Code: Mt Pleasant 52641
County: Henry
Phone: 319-986-5380
E-mail: N/A
Term Expires: 6/30/15

Name: Frances Bohlken
Address: 611 West Van Weiss
City & Zip Code: West Burlington 52655
County: Des Moines
Phone: 319-752-4876
E-mail: N/A
Term Expires: 6/30/16

Name: Jim Howell
Address: 25827 140th
City & Zip Code: Columbus Junction 52738
County: Louisa
Phone: 319-728-7602
E-mail: Howell@louisacomm.net
Term Expires: 6/30/17

Advisory Council

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

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

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

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

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

N/A

Advisory Council for Milestones.

Chair

Name: Bob Waugh
Address: 15433 105th Rd
City & Zip Code: Libertyville 52567
County: Jefferson
Phone: 641-919-0042
E-mail: bobwaugh89@gmail.com
Term Expires:

Vice-Chair

Name: Jim Howell
Address: 25827 140th
City & Zip Code: Columbus Junction 52738
County: Louisa
Phone: 319-728-7602
E-mail: Howell@louisacomm.net
Term Expires:

Other Members

Name: Leslie Arquilla
Address: 600 4th Street
City & Zip Code: Davenport 52801
County: Scott
Phone: 563-326-8258
E-mail: LArquilla@scottcountyiowa.com
Term Expires:

Name: Lee McClure
Address: 1715 N 4th St
City & Zip Code: Clinton 52732
County: Clinton
Phone: 563-357-2040
E-mail: jlmc1715@hotmail.com
Term Expires:

Name: Christy Davis
Address: 1609 State Street
City & Zip Code: Bettendorf 52722
County: Scott
Phone: 563-344-4041
E-mail: cdavis@bettendorf.org
Term Expires:

Name: Liz Sherwin
Address: 3708 11th Street
City & Zip Code: Rock Island IL 61204
County:
Phone: 309-793-0090
E-mail: exedirector@iicil.com
Term Expires:

Name: Bob Howard
Address: 802 Iowa Ave
City & Zip Code: Muscatine 52761
County: Muscatine
Phone: 563-263-3307
E-mail: howardforboss@gmail.com
Term Expires:

Name: Stephen Swisher
Address: 3324 Forest Road
City & Zip Code: Davenport 52806
County: Scott
Phone: 563-359-3289
E-mail: Swishwe62169@aol.com
Term Expires:

Name: Kristy Korpi
Address: 1459 Washington
City & Zip Code: Muscatine 52761
County: Muscatine
Phone: 563-299-8201
E-mail: kkorpi@muscatineiowa.gov
Term Expires:

Name: John Campbell
Address: 1518 Carbonado Rd
City & Zip Code: Oskaloosa 52577
County: Mahaska
Phone: 641-673-9361
E-mail: JCamp@Mahaska.org
Term Expires:

Name: Lynelle Diers
Address: 108 E Main
City & Zip Code: Ottumwa 52501
County: Wapello
Phone: 641-682-5434
E-mail: wcp@pcsia.net
Term Expires:

Name: Toni Griffith
Address: 1847 Libertyville Rd
City & Zip Code: Libertyville 52567
County: Jefferson
Phone: 641-693-3068
E-mail: tgriffith47@outlook.com
Term Expires:

Name: Cheryl Downard
Address: PO Box 276
City & Zip Code: Chariton 50049
County: Lucas
Phone: 641-774-8848
E-mail: lucasco@iowatelcom.net
Term Expires:

Name: Duffy Kester
Address: 2359 Garden Road
City & Zip Code: Allerton 50008
County: Wayne
Phone: 641-895-3725
E-mail: dkester@grm.com
Term Expires:

Name: Edd Felgar
Address: 2208 Walton Rd
City & Zip Code: Fairfield 52556
County: Jefferson
Phone: 641-472-2361
E-mail: N/A
Term Expires:

Name: Steve Laing
Address: 916 Braden
City & Zip Code: Chariton 50049
County: Lucas
Phone: 641-203-0398
E-mail: supervisors@lucasco.org
Term Expires:

Name: Lillian Frizzell
Address: 509 S De Kalb St
City & Zip Code: Corydon 50060
County: Wayne
Phone: 641-872-2215
E-mail: lilfrizz@aol.com
Term Expires:

Name: Kris Laurson
Address: 29890 St. Joseph's Drive
City & Zip Code: Centerville 52544
County: Appanoose
Phone: 641-437-3474
E-mail: KLaurson@mercydesmoines.org
Term Expires:

Name: Dorothy Goldizen
Address: PO Box 43
City & Zip Code: Pulaski 52584
County: Davis
Phone: 641-675-3643
E-mail: N/A
Term Expires:

Name: Colleen Putman
Address: 12 Princeton Blvd
City & Zip Code: Albia 52531
County: Monroe
Phone: 641-932-2423
E-mail: silverflash@iowatelcom.net
Term Expires:

Name: Matt Greiner
Address: 13808 Pearl Ave
City & Zip Code: Bloomfield 52537
County: Davis
Phone: 641-459-3453
E-mail: N/A
Term Expires:

Name: Joan Runyan
Address: 2424 601st Tr
City & Zip Code: Albia 52531
County: Monroe
Phone: 641-932-2934
E-mail: joanErnyon@gmail.com
Term Expires:

Name: Rodney Robinson
Address: PO Box 491
City & Zip Code: Keosauqua 52565
County: Van Buren
Phone: 319-293-3462
E-mail: RWRGMR@netins.net
Term Expires:

Name: Cathy Holtkamp
Address: 1167 Pilot Grove Rd
City & Zip Code: Salem 52649
County: Henry
Phone: 319-217-6197
E-mail: cathyholtkamp@gmail.com
Term Expires:

Name: Bill Thom
Address: 205 S 10th
City & Zip Code: Centerville 52544
County: Appanoose
Phone: 641-856-2505
E-mail: billyt9@mchsi.com
Term Expires:

Name: Julie Schilling
Address: 2218 Avenue H
City & Zip Code: Ft Madison 52627
County: Lee
Phone: 319-372-5225
E-mail: jschilling@leecountyhd.org
Term Expires:

Name: Lyle G Van Fleet
Address: 315 So Shuffleton St
City & Zip Code: Sigourney 52591
County: Keokuk
Phone: 641-622-2410
E-mail: N/A
Term Expires:

Name: Patricia Steiner
Address: 102 West Main Street
City & Zip Code: Mediapolis 52637
County: Des Moines
Phone: 319-753-1414
E-mail: psteiner@iastate.edu
Term Expires:

Name: Janet Bindewald
Address: 515 Avenue E
City & Zip Code: Fort Madison 52627
County: Lee
Phone: 319-470-2438
E-mail: Bindewald@hotmail.com
Term Expires:

Name: Lyn Stinson
Address: 2301 Agency St #58
City & Zip Code: Burlington 52601
County: Des Moines
Phone: 319-752-2942
E-mail: lynstinson@yahoo.com
Term Expires:

Name: Frances Bohlken
Address: 611 West Van Weiss
City & Zip Code: West Burlington 52655
County: Des Moines
Phone: 319-752-4876
E-mail: N/A
Term Expires:

Name: Geraldine Dean
Address: 1704 East Ashford Avenue
City & Zip Code: Mt. Pleasant 52641
County: Henry
Phone: 319-986-5380
E-mail: N/A
Term Expires:

LifeLong Links Advisory Council

Milestones

Name: Jim Gatti
Address: 4800 Grand Avenue, Apt E106
City & Zip Code: Davenport, IA 52807
County: Scott
Phone: 740-972-1773
E-mail: gattijames@sau.edu

Name: Stephanie Stebens
Address: 2616 E. Central Park
City & Zip Code: Davenport, IA 52803
County: Scott
Phone:
E-mail: kenziekaleb@gmail.com

Name: Elizabeth Casillas
Address: 4728 Montana Ave
City & Zip Code: Davenport, IA 52806
County: Scott
Phone: 563-391-1651
E-mail: lizcas710@aol.com

Name: Julie Anderson
Address: Hope Haven 408 S Gunnison
City & Zip Code: Burlington, IA 52601
County: Des Moines
Phone: 319-237-1319
E-mail: Julie.anderson@hopehavencorp.com

Name: Berdette Ogden
Address: PO Box 407 / 300 W Briney St
City & Zip Code: What Cheer, IA 50268
County: Regional Comm Health IDPH
Phone: 641-634-2132
E-mail: berdette.ogden@idph.iowa.gov

Name: Daylia Warden
Address: 201 11th Street, PO Box 6156
City & Zip Code: Rock Island, IL 61231
County: Scott, Clinton & Muscatine
Phone: 309-793-0090

Name: Lori Elam
Address: 600 W 4th Street
City & Zip Code: Davenport, IA 52801
County: Scott
Phone: 563-326-8723
E-mail: lori.elam@scottcountyiowa.com

Name: Jennifer Vitko
Address: 102 E Main, PO Box 217
City & Zip Code: Ottumwa, IA 52501
County: Wapello
Phone: 641-683-4576
E-mail: jvitko@wapellocounty.org

Name: Francis McAllister
Address: 2521 Sunrise Lane
City & Zip Code: Burlington, IA 52601
County: Des Moines
Phone: 319-753-6692
E-mail:

Public Hearing Documentation



Public Hearing
March 24th, 2015 at 10:00AM
Milestones Office - 935 E. 53rd Street, Davenport, IA 52807

- I. Open Hearing/call to order
- II. Sign in sheet
- III. Written Comments (if any)
- IV. Purpose of Hearing
- V. Area Plan (PowerPoint presentation)
 - A. Service Provider Requests for Proposal – Summary sheet
 - B. Budget
 - C. Mandatory Services
 - D. Priority Services
 - E. Other Services
 - F. Family Caregiver Services
 - G. Goals
 - H. Direct Service Waiver Requests
 - a) Congregate Meals
 - b) Home Delivered Meals
 - c) Nutrition Education
 - d) Evidence Based Activity
 - e) Reassurance
 - f) Family Caregiver Counseling
 - g) Options Counseling
 - I. Units of Service
- VI. Comments
- VII. Adjournment

Public Hearing Attendees:

Lee McClure, Board Member, Clinton County
Kim Goering, Staff
Jim Howell, Board Member, Louisa County
Tina Jaegers, Staff
Jim Gatti, St. Ambrose MSW Intern
Steve Swisher, Board Member, Scott County
Cheryl Badolato, Staff
Charlene Baxter, Staff
Frances Bohlken, Board Member, Des Moines County
Jeri Dean, Board Member, Henry County
Bob Howard, Board Member, Muscatine County
Bill Thom, Board Member, Appanoose County
Jeri Swisher, Staff
Pam Taylor, Staff
Christa Merritt, Director

HEARING NOTICE:

There will be a Public Hearing on the Two Year Area Plan on behalf of Milestones Area Agency on Aging on Tuesday March 24, 2015 at 10am, 935 E. 53rd Street, Davenport, IA.

This hearing is to provide Area Plan information, for Area V of the Iowa Department on Aging, comprised of Appanoose, Clinton, Davis, Des Moines, Henry, Jefferson, Keokuk, Lee, Louisa, Lucas, Mahaska, Monroe, Muscatine, Scott, Van Buren, Wapello, and Wayne Counties, on the multi year plan of programs for the 60+ population. All interested person are encourage to attend.

Both direct and contract services will be discussed.

For additional information contact Christa Merritt, CEO at 1-855-410-6222 ext. 230 / 563-484-3106.

NEWSPAPERS LISTED:

Albia - Moravia Union
Bloomfield Democrat
Centerville - The Iowegian
Clinton Herald
Davenport Quad City Times
DeWitt Observer
Fairfield Journal
Ft. Madison Democrat
Mt. Pleasant News
Oskaloosa Herald
Seymour Herald
Van Buren County Register
Wayne County News

Albia Newspapers
Burlington Hawkeye
Chariton Newspaper
Columbus Jct Gazette
Des Moines County News
Eldridge North Scott Press
Farmington Leader-Record
Mediapolis News
Muscatine Journal
Ottumwa Courier
Signourey News
Wapello Republican
Winfield Beacon



**Public Hearing Minutes
FY 2016-2017 Area Plan
Tuesday, March 24, 2015**

The Public Hearing was declared open at 10:00 AM by Milestones' Board of Directors Vice Chairperson, Bob Howard.

Christa Merritt, Jeri Swisher, Peggy Dykes, Cheryl Badolato, Tina Jaegers, Kim Goering, Pam Taylor, Jim Gatti, Charlene Baxter, Bob Howard, Stephen Swisher, Frances Bohlken, Jeri Dean, Jim Howell, Lee McClure, Bill Thom were in attendance. There were a total of 16 people in attendance.

There were no written comments submitted for the public hearing.

Christa Merritt explained the purpose of the Public Hearing. The purpose of this meeting is to inform the public of the Area Plan for FY 2016 and to gain comments regarding the direct service(s) planned by the AAA.

Christa presented the Service Provider Requests for Proposals for the FY 2016 Area Plan. Contracted services that will be provided are Transportation, Ill E Counseling, Homemaker, Adult Day Care, Outreach, Chore, Health Promotion, Ill E Respite, Reassurance/Visiting, Home Delivered Meals Subsidy, Home Delivered Meal Delivery, Congregate Meals, Home Delivered Meals, Meal Trays, and Raw Food. All service providers that were funded in FY 2015 applied for funding for FY 2016.

Transportation Applicants	FY 2016 Funding Amounts
10-15 Regional Transit	\$100,573.44
Friendly House	\$ 880.00
River Bend Transit	\$33,250.00
SE IA Regional Planning Commission	\$17,500.00
The Diversity Service Center of IA	\$ 352.00

IIIE Counseling Applicants	FY 2016 Funding Amounts
Alzheimer’s Association	\$11,440.00
Family Program Services of Muscatine Community	\$13,200.00

Homemaker Applicants	FY 2016 Funding Amounts
Appanoose Community Care Services	\$ 7,778.57
Davis County Public Health	\$ 4,344.38
Home Caring Services, Inc (New)	\$ 3,848.99
Jefferson County Public Health	\$ 7,826.63
Keokuk County Public Health	\$ 5,984.06
Lee County Health Department	\$ 3,960.00
Louisa County Public Health (New)	\$ 3,848.99
Lucas County Public Health Nursing Service	\$ 5,057.02
Mahaska Health Partnership	\$10,371.56
Monroe County Public Health	\$ 4,328.33
Van Buren County Public Health	\$ 4,406.81
Wapello County Public Health	\$11,073.92
Wayne County Home Care Aide Agency	\$ 4,150.51

Adult Day Care Applicant	FY 2016 Funding Amounts
Center for Active Seniors, Inc (CASI)	\$20,680.00

Outreach Applicants	FY 2016 Funding Amounts
Center for Active Seniors, Inc (CASI)	\$15,400.00
Friendly House	\$ 3,528.80
Diversity Center	\$19,360.00

Community Action of Southeast Iowa requested \$34,117.60 for FY 2016 to provide Chore. The recommended funding amount for Community Action of Southeast Iowa is \$34,117.60 for FY 2016.

Des Moines County Public Health requested \$10,151.68 for FY 2016 to provide Health Promotions. The recommended funding amount for Des Moines County Public Health is \$10,151.68 for FY 2016.

IIIE Respite Applicants	FY 2016 Funding Amounts
Henry County Health Center- Community Hlth Dept.	\$ 5,148.00
Home Caring Services	\$ 3,707.98
Lee County Health Department	\$ 3,745.37
Louisa County Public Health (New)	\$ 1,664.15
Monroe County Public Health	\$ 2,376.00

The recommended funding for Lee County Health Department for Reassurance/Visiting for FY 2016 is \$2,500.

We are required to fund legal services at the rate of 3% of our IIB money less administration. This is the minimum that we are required by law to make available. The current recommended funding amount is \$56,177.44 for legal services to Iowa Legal Aid.

Appanoose Community Care requested a 27¢ per meal subsidy. The recommended funding amount is \$1,620 for an estimated 6,000 meals in Centerville. The meals are NISP eligible for which we receive NISP reimbursement.

Christian Opportunity Center requested \$16.24 per route and 37¢ per mile. The recommended funding is \$16.24 per route and 37¢ per mile.

Hy-Vee requested \$6.00 per meal for congregate and home delivered meals. The recommended funding is \$6.00 per meal.

Sodexo Campus Services requested \$6.00 per meal for congregate and home delivered meals. The recommended funding is \$6.00 per meal.

The Diversity Service Center of IA requested \$6.00 per meal for congregate meals. The recommended funding is \$6.00 per meal.

Trinity Muscatine requested \$6.00 per meal for congregate and home delivered meals. The recommended funding is \$6.00 per meal.

Oliver Packaging and Equipment Company requested \$151 per carton of 600 shallow trays and \$155 per carton of 600 deep trays. The recommended funding is

Jim Howell asked questions about funding amounts. Bill Thom asked questions about funding and cooking sites.

Christa presented the projected budget for the FY 2016 Area Plan. Bill Thom asked questions about funding from State and Federal and other sources.

Christa presented the mandatory services, our projected units, and they way that unit was counted.

It is a requirement of the Older American's Act that a certain percentage of the IIB resources be spent on priority services. We are required to spend 10% of IIB funds for Access, 5% of our IIB funds for In-Home services and 3% for Legal Services. These requirements have been met as follows:

- Access service is met through Case Management, Transportation, Info/Assistance, and Outreach.
- In-Home service is met through Homemaker, Chore, Daycare, and Reassurance/Visiting.
- Legal Services is met through Legal Assistance.

Frances Bohlken asked questions about Outreach. Jim Howell asked questions about Homemaker units. Bob Howard asked questions about the mandatory and priority services.

Christa presented the Other Services we will be providing. She explained the services, units we projected to provide during FY 2016 and the way each unit is counted.

Christa presented the Family Caregiver services. She explained the units we projected to provide during FY 2016 and the way each unit is counted. Frances Bohlken asked about Respite. Jim Howell asked about Options Counseling.

It is required to request permission from the Iowa Department on Aging to provide the following services directly as opposed to contracting them out: We are requesting permission to directly provide the following programs: Congregate Meals, Home Delivered Meals, , Nutrition Education, Evidence Based Activity, Reassurance, Family Caregiver Counseling, and Options Counseling. Frances Bohlken asked about Reassurance.

Christa presented the projected Units of Services for FY 2016. There were no questions.

Christa presented the Goals. Jim Howell asked about meeting the goals.

There were no comments or questions.

Motion made by Frances Bohlken, seconded by Stephen Swisher, to close the public hearing. The public hearing was closed at 10:30 AM.

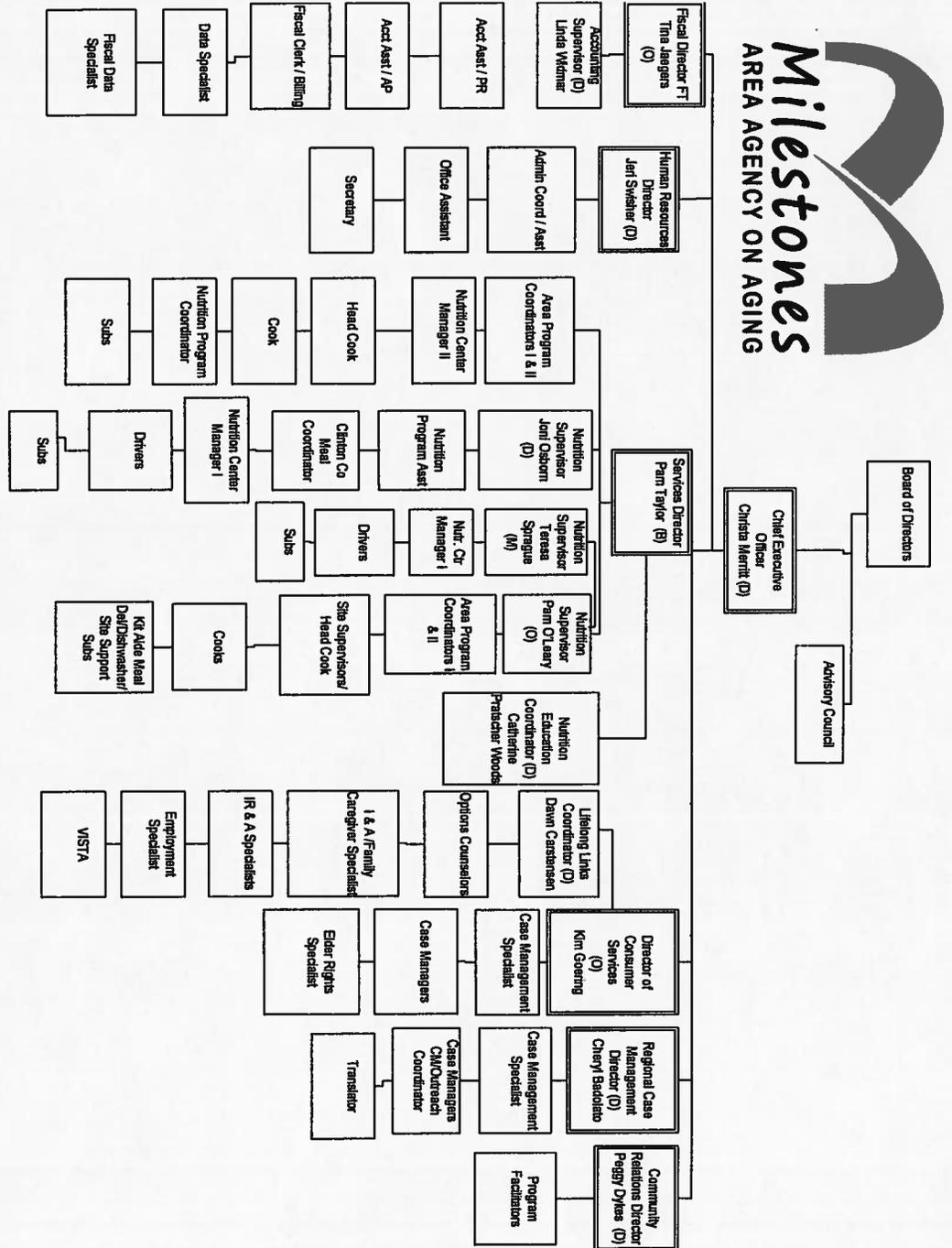
Goals – Christa presented the goals. Jim Howell asked a question about meeting the goals.

Comments - there were no additional comments

Adjournment - Motion made by Frances Bohlken, seconded by Stephen Swisher, to close the public hearing. The public hearing was closed at 10:30 AM.

Section 5: Area Profile - Staffing / Coverage

Table of Organization



OAA Service Coverage by County

[For counties where a service is not available, please indicate the reason.]

Mandatory & Other Services	Appanoos e	Clinton	Davis	Des Moines	Henry	Jefferso n	Keokuk	Lee	Louisa	Lucas
Case Management	X	X	X	X	X	X	X	X	X	X
Congregate Meals	X	X	X	X	X	X	X	X	X	X
Health Promotion	X	X	X	X	X	X	X	X	X	X
Home Delivered Meals	X	X	X	X	X	X	X	X	X	X
Information & Assistance	X	X	X	X	X	X	X	X	X	X
Legal Assistance	X	X	X	X	X	X	X	X	X	X
Nutrition Counseling	X	X	X	X	X	X	X	X	X	X
Nutrition Education	X	X	X	X	X	X	X	X	X	X
Options Counseling	X	X	X	X	X	X	X	X	X	X
Other Service(s)										
Adult Day Care/Adult Day Health	Lack of provider									
Evidence-Based Health Activities	X	X	X	X	X	X	X	X	X	X
Outreach	X	X	X	X	X	X	X	X	X	X
Transportation	x	x	X	X	X	X	X	X	X	x

Mandatory & Other Services	Mahaska	Monroe	Muscatine	Scott	Van Buren	Wapello	Wayne			
Case Management	X	X	X	X	X	X	X			
Congregate Meals	X	X	X	X	X	X	X			
Health Promotion	X	X	X	X	X	X	X			
Home Delivered Meals	X	X	X	X	X	X	X			
Information & Assistance	X	X	X	X	X	X	X			
Legal Assistance	X	X	X	X	X	X	X			
Nutrition Counseling	X	X	X	X	X	X	X			
Nutrition Education	X	X	X	X	X	X	X			
Options Counseling	X	X	X	X	X	X	X			
Other Service(s)										
Adult Day Care/Adult Day Health	Lack of provider	Lack of provider	Contract terminated	X	Lack of provider	Lack of provider	Lack of provider			
Evidence-Based Health Activities	X	X	X	X	X	X	X			
Outreach	X		X	X	X	X	X			
Transportation	X	X	X	X	X	X	X			

Nutrition Services and OAA Providers

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

Nutrition Services

Agency staff has reviewed the following Nutrition Services information entered into IAPRS and verify that the information is current as of April 14, 2015.

Agency staff has reviewed the Service Provider information entered into IAPRS and verify that the information is current as of April 14, 2015.

Request for Direct Service Waiver

The service for which the Milestones Area Agency on Aging seeks a Direct Service Waiver for SFY 2016-2017 is: Home Delivered Meals.

3. Section 307(a)(8) of the Older Americans Act provides that services will not be provided directly by the Area Agency on Aging unless, in the judgment of the State agency, it is necessary due to one or more of the three provisions listed below.

Please select the basis for which the waiver request is required. (You may select more than one).

- d. Provision of the service(s) by the area agency on aging is necessary to assure an adequate supply of such services;
- e. Such service(s) are directly related to area agency on aging administrative functions; or
- f. The service(s) can be provided more economically, and with comparable quality, by the area agency on aging.
4. Provide a detailed justification for the waiver request.
- The justification should include such factors as a cost analysis or needs assessment, the area agency's efforts to secure services through a competitive solicitation process such as a request for proposal (RFP).
 - If the service is considered part of administration activity, describe the rationale for considering it part of the administrative activity and the authority for that rationale.

Due to our very rural PSA, home delivered meals would not be accessible to many elderly unless they were provided through our congregate meal sites.

Provide documentation of the public hearing held to gather public input on the proposal to directly provide service(s), per SFY 2016-2017 Area Plan on Aging instructions.

Christa Merritt

4-28-15

Signature, Executive Director

Date

Request for Direct Service Waiver

The service for which the Milestones Area Agency on Aging seeks a Direct Service Waiver for SFY 2016-2017 is: Options Counseling

13. Section 307(a)(8) of the Older Americans Act provides that services will not be provided directly by the Area Agency on Aging unless, in the judgment of the State agency, it is necessary due to one or more of the three provisions listed below.

Please select the basis for which the waiver request is required. (You may select more than one).

- s. Provision of the service(s) by the area agency on aging is necessary to assure an adequate supply of such services;
- t. Such service(s) are directly related to area agency on aging administrative functions; or
- u. The service(s) can be provided more economically, and with comparable quality, by the area agency on aging.

14. Provide a detailed justification for the waiver request.

- The justification should include such factors as a cost analysis or needs assessment, the area agency's efforts to secure services through a competitive solicitation process such as a request for proposal (RFP).
- If the service is considered part of administration activity, describe the rationale for considering it part of the administrative activity and the authority for that rationale.

Milestones has several staff that provide Options Counseling services through the Lifelong Links program. There are three Options Counselors, two IR&A staff and a LifeLong Links Coordinator available to assist those in need of long term supports.

Provide documentation of the public hearing held to gather public input on the proposal to directly provide service(s), per SFY 2016-2017 Area Plan on Aging instructions.

Christa Merritt
Signature, Executive Director

4-28-2015
Date

Milestones Agency on Aging - Area Plan Corrections / Responses

Please complete required actions and respond to information requests below on issues identified for focus areas noted in area plan. Responses are due by 4:00 pm on May 27, 2015. Please send responses by e-mail to Shan Sasser at Shan.Sasser@iowa.gov.

Area Plan Section 1: 2016-2017 Goals and Strategies

Agency was not responsive to requested information. The needs listed in each focus area were not specific and did not appear to be based on consumer assessments or data evaluation. Since specific needs were not defined, strategies listed were broad and no methods to evaluate effectiveness of activities were defined. Agency also did not provide requested information regarding additional services for current meal program and caregiver consumers.

Strategy – Projections Questions

Goal 1 Focus Area: LifeLong Links

1. Please explain discrepancy in strategies to expand LifeLong Links activities and decrease in IR&A, Access Assistance, and Caregiver Options Counseling consumer and service unit projections as noted below.
2. Agency proposes to provide 576 units of Options Counseling service to 552 individual consumers, which suggest Options Counselors will most likely spend no more than a total of one hour with each Options Counseling consumer. Are these projections accurate? Please explain.

Service	Total Units FY15	Total Clients FY15	Total Units FY16	Total Clients FY16	% change Units	% change clients	FY15 – total expenditure	FY16 - total expenditure	% change total expenditure
Information and Assistance	1,676	1,676	1,000	800	-40%	-52%	\$66,917	\$55,013	-18%
Access Assistance (Caregivers)	2,104	2,104	1,258	818	-40%	-61%	\$209,360	\$244,597	16%
Access Assistance (Grandparent /Older Relative)	31	31	2	2	-94%	-94%	\$10,995	\$3,443	-69%
Options Counseling	400	300	576	552	44%	84%	\$110,746	\$287,439	160%

Service	Total Units FY15	Total Clients FY15	Total Units FY16	Total Clients FY16	% change Units	% change clients	FY15 – total expenditure	FY16 - total expenditure	% change total expenditure
Options Counseling for Caregivers	90	90	24	12	-73%	-87%	\$8,029	\$4,773	-41%

Response #1: The decrease in the IR & A units is due to the new requirements that all IR&A be a registered service. We are now counting all calls coming into the agency and we will not be registering every caller, decreasing those that are counted in the unit total.

We have adjusted out Access and Assistance units to 2300 and our total clients to 2000. This results in a 9% increase in units, a 5% decrease in clients and an over 16% increase in budget due to increases in staff rates and other anticipated increases.

In regards to the Caregiver Options Counseling units, we aren't clear on where the 90 units/clients came from as we have reported 0 on our reports. We were not providing this service prior to this year. When we figured our first calculations we were looking at this data as our baseline year. Therefore, we predicted a low amount in this area as we feel most of our OC units will be reported within regular OC.

Response #2: The Options Counseling total clients FY 16 has been adjusted to 432.

Goal 2 Focus Area: Transportation

1. Plan narrative provided scant information regarding transportation needs for older lowans in the agency's planning and service area. Please provide more information regarding transportation needs and explain the 9% increase in projected expenditures for this service.

Service	Total Units FY15	Total Clients FY15	Total Units FY16	Total Clients FY16	% change Units	% change clients	FY15 – total expenditure	FY16 - total expenditure	% change total expenditure
Transport.	28,719	28,719	29,095	2,425	1%	-92%	\$177,713	\$193,365	9%

Response: This change is completely due to the change in reporting. All riders will be registered now which will more accurately depict the actual clients.

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

1. Agency responded "unknown" to request for the percentage of caregiver consumers receiving additional AAA services. IDA provided all agencies with detailed consumer and service data. Please explain why requested information was not submitted.
2. In plan narrative, agency did not define specific caregiver needs or plan any changed strategies to address caregiver needs. Please explain decrease in these projected caregiver services: Access Assistance, Options Counseling, and Respite.
3. Please explain significant increase in Information Services units with significant decrease in projected funding.

Service	Total Units FY15	Total Clients FY15	Total Units FY16	Total Clients FY16	% change Units	% change clients	FY15 – total expenditure	FY16 - total expenditure	% change total expenditure
Access Assistance (Caregivers)	2,104	2,104	1,258	818	-40%	-61%	\$209,360	\$244,597	16%
Access Assistance (Grandparent /Older Relative)	31	31	2	2	-94%	-94%	\$10,995	\$3,443	-69%
Options Counseling for Caregivers	90	90	24	12	-73%	-87%	\$8,029	\$4,773	-41%
Counseling	326	232	398	182	22%	-22%	\$13,511	\$18,948	40%
Respite	1,151	45	660	41	-43%	-9%	\$55,452	\$31,422	-36%
Information Services	20	2,827	40	24,672	100%	773%	\$7,849	\$1,586	-80%
Supplemental Services	1	1	1	1			\$495	\$523	
Self-Directed Care	1	1	1	1			\$644	\$666	

Response #1: Our data indicates that we have 87.1% of Family Caregivers receiving 2 or more services. We project this to maintain or slightly increase to 88% for FY 16.

Response #2: We have adjusted our Access Assistance units to 2300 and our units to 2000. In regards to the Caregiver Options Counseling units, we aren't clear on where the 90 units/clients came from as we have reported 0 on our reports. We were not providing this service prior to this year. When we figured our first calculations we were looking at this

data as our baseline year. Therefore, we predicted a low amount in this area as we feel most of our OC units will be reported within regular OC.

The respite units were decreased due to the fact that the provider is projecting those are the units they can fulfill.

Response #3: This was a data input error. We have changed the units to 30 with clients to 3000.

Goal 3 Focus Area: Nutrition and Food Security Project

1. Agency described activities to expand congregate meal program; however, FY2016 consumer, service unit, and expenditure projections show a decrease from previous year. Please explain.
2. Agency proposes to serve over 100% more home delivered meal consumer than previous year with no increase in projected expenditures. Please explain.
3. Agency proposes no changes to Nutrition Counseling consumers or service units with an 8% increase in projected expenditures. Please explain.
4. Agency proposes to provide Nutrition Education to a significantly higher number of consumers than Congregate Meal consumers, who are often the recipients of the Nutrition Education service. Will Nutrition Education services be provided to consumers outside of the Congregate Meal setting? Please explain.
5. Agency responded "unknown" to request for the percentage of meal program consumers receiving additional AAA services. IDA provided all agencies with detailed consumer and service data. Please explain why requested information was not submitted.

Service	Total Units FY15	Total Clients FY15	Total Units FY16	Total Clients FY16	% change Units	% change clients	FY15 – total expenditure	FY16 - total expenditure	% change total expenditure
Congregate Meal	186,908	3,727	172,214	3,190	-8%	-14%	\$1,792,363	\$1,778,923	-1%
Home Delivered Meal	152,390	1,521	153,270	3,169	1%	108%	\$1,199,304	\$1,196,838	-0.21%
Nutrition Counseling	20	20	20	20	0	0	\$3,951	\$4,239	8%
Nutrition Education	16,002	16,002	23,160	23,160	44%	44%	\$72,724	\$67,999	-7%

Response #1: Milestones is going to explore grant options and other innovative ideas to expand the meal program. This has been a very tight budget area with little room to expand services with the funding provided. Therefore, we anticipated a slight decrease

due to the overall trend in the decrease of congregate meals. However, we hope to continue to expand with the possibility of grants.

Response #2: This was a data error. The total client number has been adjusted to 1,550.

Response #3: This is due to increases in staff pay within the program for the upcoming year.

Response #4: Nutrition Education is provided to Congregate and Home Delivered meal recipients. The total client number has been adjusted to 4,561 to reflect this correlation.

Response #5: Milestones data indicates that 54% of meal recipients are receiving 2 or more services. We are projecting a slight increase to 58% for FY 16.

Goal 4 Focus Area: Elder Abuse Prevention and Awareness

Agency responded "unknown" to request for the percentage of EAPA consumers receiving additional AAA services. This information is reported monthly. Please explain why requested information was not submitted.

Response #: The percentage of EAPA consumers receiving additional AAA services is 27%.

Form 3A-1 Corrections

Obsolete Services

The *SFY 2016 Area Agency on Aging Reporting Manual* was distributed to all Area Agencies on Aging on December 16, 2014. This reporting manual reflected changes to the service taxonomy. Your agency's Form 3A-1 included consumer and service unit projections for these services which are no longer in the service taxonomy:

- Public Information – **Moved to Training and Education**
- Reassurance / Visiting – **Moved to Outreach**

Unit Projections

Material Aid. The unit projections for Material Aid may not align with the unit measure. If your agency staff is likely to have more than one contact with a consumer during the provision of the material aid service, then unit projections should be greater than consumer projections. (For example, a consumer needs a ramp and agency staff have three separate conversations about count this as 1 consumer and 3 units of service.)

Required Action: We feel as though our projections are accurate based on history of material aid utilization.

1. Update your agency's Form 3A-1 by removing consumer and unit projections for these services: Public Information and Reassurance / Visiting.
2. Verify the Material Aid unit measures. Revise Form 3A-1 as necessary.

Area Plan Budget Corrections

1. Agency's area plan budget report included expenditure projections for these services which are no longer in the service taxonomy:
 - Public Information
 - Reassurance / Visiting

Required Action:

AAA must resubmit area plan budget. Remove expenditures from Public Information and Reassurance / Visiting.

Waiver Corrections

The requested a waiver to provide Reassurance directly is unnecessary as the service is no longer in service taxonomy.

Agency requested a waiver to provide Family Caregiver Counseling as a direct service and has contracted with Alzheimer's Association and Family Program Services of Muscatine Community. Waiver justification does not address why agency needs to supplement the contracted service.

Required Action:

Review Family Caregiver request justification and re-submit updated waiver request.

Milestones does provide Family Caregiver Counseling as a direct service in addition to the Alzheimer's Association. Support groups are provided to different participants. The Family Program Services of Muscatine Community is the Grandparent program.

Other Corrections

Table of Organization

Agency did not respond to request anticipated staffing issues in FY2016.

Required Action:

Staffing changes are anticipated but unknown due to the changes coming with Managed Care. We are currently developing a policy and protocol for a Reduction in Workforce.

Contract with Service Providers

Agency indicates staff reviewed service provider information in IAPRS. However, the contractors listed on pages 32 – 33 do not match the active provider list generated by IDA staff on May 12, 105. (For example, eight chore contracted providers are listed in IAPRS. Only one is referenced on page 33.)

Required Action:

Please review contracted providers list in IAPRS and resubmit page 57 of submitted area plan with new verification date if necessary.

The service provider list that you refer to on pages 32-33 are those providers that completed an RFP and receive direct funding from Milestones. However, this is not an all encompassing list of providers within the region. We may have providers listed in IAPRS that are utilized through the elderly waiver or other source. The providers listed on pages 32-33 are those receiving OAA dollars and completed the RFP process.