Older Americans Act Requirements for the Local Planning Process

Sherry Hanna
Aging Programs Specialist
California Department of Aging
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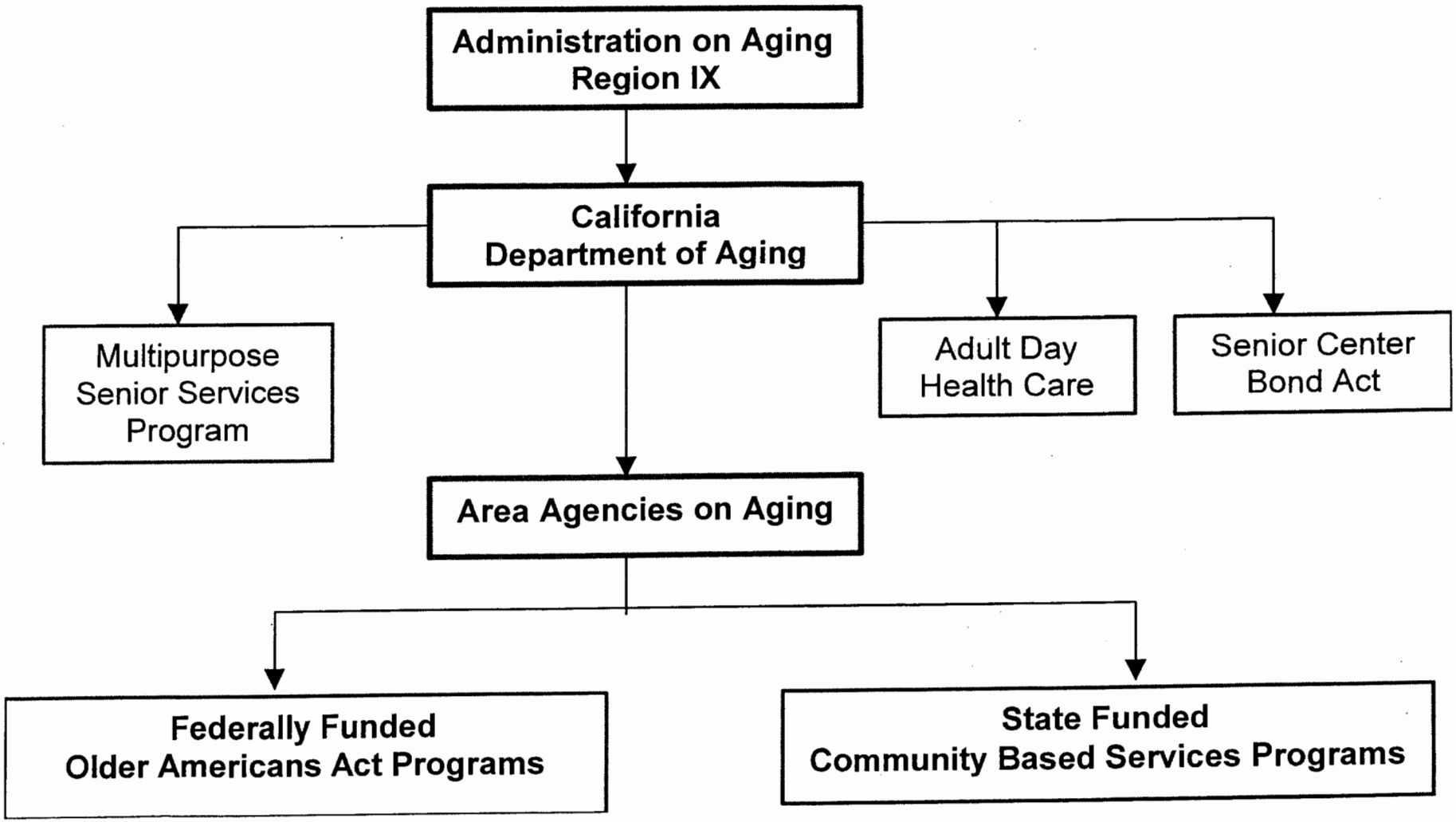
OBJECTIVE FOR TODAY

An overview of the Older Americans Act requirements for the local planning process used by Area Agencies on Aging

Administration of Aging Services



Federally Funded Programs

- **Title III B**: LTC Ombudsman & Supportive Services
- **Title III C-1**: Congregate Nutrition
- **Title III C-2**: Home Delivered Meals
- **Title III D**: Disease Prevention & Health Promotion
- **Title III E**: Family Caregiver Support Program
- **Title V**: Senior Employment
- **Title VII**: LTC Ombudsman & Prevention of Elder Abuse

State Funded Programs

- Alzheimer's Day Care Resource Center Program
- Brown Bag Program
- Foster Grandparent Program
- Health Insurance Counseling & Advocacy Program
- Linkages Program
- Senior Companion Program
- Respite Program

Aging Framework

- **Administration on Aging**
  - Older Americans Act

- **California Department of Aging**
  - Designated State Unit on Aging
  - California Code of Regulations
  - Older Californians Act

Aging Framework

- **Area Agencies on Aging (33)**
  - Organizational Type
    - County Government (19)
    - Private Nonprofit (6)
    - University Foundation (1)
    - Joint Powers Agreement (6)
    - City Government (1)
  - Governing Board
  - Advisory Council

Older Americans Act Funds

- Designation of Area Agencies on Aging
- Development of new or improved programs for older persons
- Intent of Program Funds:
  - Seed Money, Fill Gaps
  - Cash or In-kind Contribution Required
  - Fundraising and Donations Needed as Supplements

Prescribed Minimum Matching Requirements

Only 2 *Community Based Services Programs* require a match:

1. Alzheimer's Day Care Resource Centers
   - Local: 25% cash or in-kind

2. Brown Bag
   - Local: 25% cash and 25% in-kind

Prescribed Minimum Matching Requirements

Title III

- State: 5%
- Local: 10%

Title V

- Local: 10% cash or in-kind

Client Population

- Older Americans Act Programs
  - individuals 60 and older
  - caregivers (ages 18+) of individuals 60 and older
  - grandparents (age 60 and older) caring for children ages 18 and under
  - Exception: Title V-- individuals 55 and older

- Older Californians Act Programs
  - Older individuals & persons with disabilities
  - Criteria varies by program

Role of Area Agencies on Aging

- Focal Point of Senior Services in the Community
- Leadership for Coordination of Services
- Scope of Planning Responsibilities
  - **ONLY** Older Americans Act and Older Californians Act Programs

Local Planning Requirements Overview

- ❑Needs Assessment
- ❑Establishing Priorities
- ❑Goals and Objectives
- ❑Service Unit Plan and Budget
- ❑ Area Plan
- ❑Annual Update of Area Plan
- ❑Year-End Report
- ❑Monitoring

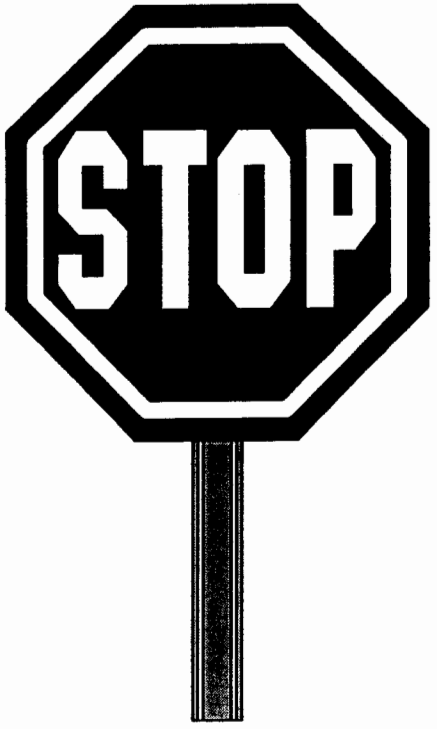
Needs Assessment

- Identify target populations
- Determine types and extent of existing and potential needs for services
- Identify existing resources to meet needs
- Identify existing constraints to providing services

Establishing Priorities

- Determine Needs
- Compare to Resources Available
- Obtain Public Input
- Meet State & Federal Mandates
  - Target Population
  - Adequate Proportion for Priority Services
- Analyze Constraints

Establishing Priorities



AAA required priorities relate to issues that can be addressed through programs funded by the Older Americans Act and the Older Californians Act

Local Monitoring

- AAAs monitor achievement of Area Plan goals & objectives
- AAAs monitor, evaluate, and document the program and fiscal performance of subcontractors
- AAAs submit quarterly and annual data reports to CDA

Year-End Report Requirements

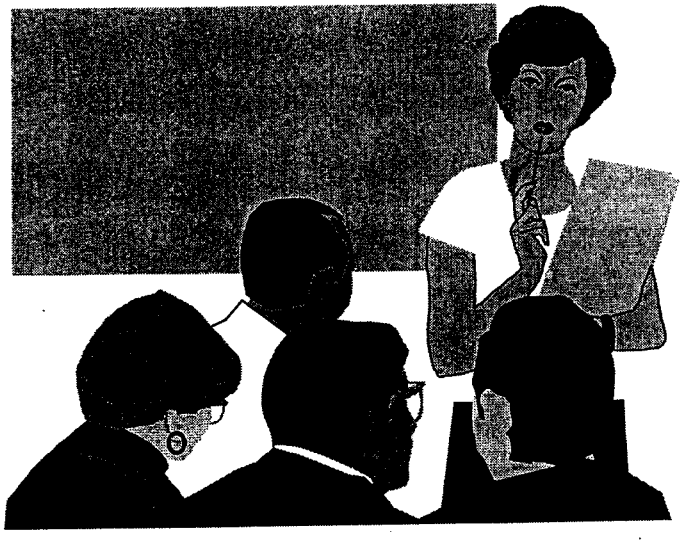
- **Performance Report**
  - Account of progress made against goals
  - Key Activities
  - Significant challenges encountered in achieving goals and objectives

Annual Update Requirements

- Provides a method for AAAs to address changing environments and unforeseen circumstances
  - Area Plan Updates are submitted annually
    - Add, change, or delete objectives
  - Amendments to Area Plan may be submitted as necessary

Local Oversight & Approval

- Public Hearing
- Advisory Council
- Governing Board



Area Plan Content

- Description of the Planning and Service Area
- Description of the AAA
- Mission Statement
- Description of the Needs Assessment Process
- Targeting
- Identification of Priorities

Area Plan Document

- Planning requirements serve as the **foundation** for development of the Area Plan
- The Area Plan planning period is four years
- Area Plans are updated yearly

Service Unit Plan & Budget

- Indicate the number and types of services to be provided
- Provide a budget displaying funding allocated to each service

Establishing Goals & Objectives

- Required for every State or federally-funded service provided by the AAA
- Based on:
  - needs assessment, identified priorities, and available resources
- Provide a rationale for every goal
- Develop objectives to meet goals

Constraints

- Funding
- Staffing
- Political Environment
- Geographic Limitations
- Limited Providers Available

Adequate Proportion/ Priority Services

- Access
  - Information & Assistance, Transportation, Outreach, and Case Management
- In-Home Services
  - Personal Care, Homemaker, and Chore
- Legal Assistance

Targeting Services

Older individuals in the community and living in long-term care facilities, with the following characteristics:

Targeting Services

- Greatest economic/social need
- Low-income and minorities
- Living in rural areas
- Limited English-speaking ability
- Frail or have Alzheimer's disease or related disorders, and their caregivers
- Isolated, abused, neglected, or exploited