



IOWA DEPARTMENT ON AGING
510 E 12TH ST., STE. 21 | DES MOINES, IA 50309 | IOWAAGING.GOV

Signed Verification of Agency Intent and Compliance

The Heritage Area Agency on Aging - corrected and submitted 5/11/2018

(AAA) accepts full authority and responsibility to develop and administer the SFY2019 Update to the SFY 2018 - SFY 2021 Area Plan on Aging in accordance with all requirements of the Older Americans Act as amended through P.L. 114-144 (2016), state laws, rules, and procedures. The Parties agree that Area Plan is incorporated herein by this reference as if fully set forth in this Agreement. The AAA verifies that the following conditions are and will continue to be met:

1. The AAA agrees it will comply with the Area Plan Assurances. These assurances are available at <https://iowaaging.gov/area-agencies-aging/area-plan-aging-guidance>. The Parties agree that Area Plan Assurances are incorporated herein by this reference as if fully set forth in this Agreement.
2. The AAA agrees it will comply with the Procurement Terms and Conditions for Services as set forth by the Iowa Department of Administrative Services. These Procurement Terms and Conditions for Services are available at <https://das.iowa.gov/procurement/terms-and-conditions>. The Parties agree that Procurement Terms and Conditions for Services are incorporated herein by this reference as if fully set forth in this Agreement.
3. The AAA agrees it will comply with the Department of Human Services Standard Terms and Conditions related to Federal Financial Assistance. These Standard Terms and Conditions related to Federal Financial Assistance are available at <https://iowaaging.gov/area-agencies-aging/area-plan-aging-guidance>. The Parties agree that Standard Terms and Conditions related to Federal Financial Assistance are incorporated herein by this reference as if fully set forth in this Agreement.
4. The AAA agrees it will comply with the requirements of Iowa code chapter 8F. These Terms are available at <https://iowaaging.gov/area-agencies-aging/area-plan-aging-guidance>. The Parties agree that 8F Terms and Conditions related to Federal Financial Assistance are incorporated herein by this reference as if fully set forth in this Agreement.
5. The AAA agrees it will comply with the process and procedures described in the reporting manual. The Reporting Manual is available <https://iowaaging.gov/area-agencies-aging/area-plan-aging-guidance>. The Parties agree the Reporting Manual is incorporated herein by this reference as if fully set forth in this Agreement.

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.



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The **Advisory Council** has reviewed and commented on the SFY 2019 Update to the SFY 2018 - SFY 2021 Area Plan on Aging, and hereby submits the SFY 2019 Area Plan Update to the Iowa Department on Aging for acceptance by the Iowa Commission on Aging.

see previous submission

NAME OF ADVISORY COUNCIL SIGNER

ADVISORY COUNCIL SIGNATURE

The **Governing Body** has reviewed and approved the SFY 2019 Update to the SFY 2018 - SFY 2021 Area Plan on Aging, and hereby submits the SFY 2019 Area Plan Update to the Iowa Department on Aging for acceptance by the Iowa Commission on Aging.

Mr. James Mollenhauer

NAME OF GOVERNING BODY SIGNER

James Mollenhauer

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Mollenhauer
Date: 2018.05.04 06:59:21 -05'00'

GOVERNING BODY SIGNATURE

The **Executive Director** has reviewed and approved the SFY 2019 Update to the SFY 2018 - SFY 2021 Area Plan on Aging, and hereby submits the SFY 2019 Area Plan Update to the Iowa Department on Aging for acceptance by the Iowa Commission on Aging.

see previous submission

NAME OF EXECUTIVE DIRECTOR

EXECUTIVE DIRECTOR SIGNATURE



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The **Advisory Council** has reviewed and commented on the SFY 2019 Update to the SFY 2018 - SFY 2021 Area Plan on Aging, and hereby submits the SFY 2019 Area Plan Update to the Iowa Department on Aging for acceptance by the Iowa Commission on Aging.

Lawrence Kudej, Vice Chair

NAME OF ADVISORY COUNCIL SIGNER

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Date: 2018.02.28 14:12:25 -06'00'

ADVISORY COUNCIL SIGNATURE

The **Governing Body** has reviewed and approved the SFY 2019 Update to the SFY 2018 - SFY 2021 Area Plan on Aging, and hereby submits the SFY 2019 Area Plan Update to the Iowa Department on Aging for acceptance by the Iowa Commission on Aging.

Renee Riffey, Chair

NAME OF GOVERNING BODY SIGNER

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Date: 2018.03.15 15:35:26 -05'00'

GOVERNING BODY SIGNATURE

The **Executive Director** has reviewed and approved the SFY 2019 Update to the SFY 2018 - SFY 2021 Area Plan on Aging, and hereby submits the SFY 2019 Area Plan Update to the Iowa Department on Aging for acceptance by the Iowa Commission on Aging.

Jill Sindt; Interim Executive Co-Director

NAME OF EXECUTIVE DIRECTOR

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Date: 2018.03.15 11:42:28 -05'00'

EXECUTIVE DIRECTOR SIGNATURE

The Heritage Area Agency on Aging PSA #4

SFY 2019 Area Plan on Aging Update
Area Plan on Aging SFY 2018 – 2021



The Heritage Agency™

Plan Effective Dates: July 1, 2018-June 30, 2021
Plan Update: July 1, 2019

Heritage Area Agency on Aging Update	3
Section 1: Update on Strategies to Achieve 2018-2021 Goals	5
Goal 1: Iowa Aging Network will protect and enhance the rights; and prevent the abuse, neglect, and exploitation of older lowans.	5
Goal 2: Iowa Aging Network will work with older lowans, lowans with disabilities, and caregivers as they fully engage and participate in their communities, make informed decisions, and exercise self-determination and control about their independence, well-being, and health.	10
Goal 3: Iowa Aging Network will enable Older lowans to remain in their own residence and community of choice.....	16
Section 2: Performance and Service Projections.....	25
Performance Outcome & Fiscal Year Targets	25
SFY 2019 Projected Older Americans Act Consumers and Service Units	30
Service Coverage & Wait List Information	31
Section 3: Quality Management	33
Section 4: Public Input	34
Public Hearing Requirements.....	35
Governing Body	36
Advisory Council	37
LifeLong Links Advisory Council	40
ATTACHMENTS.....	42
Authorized Signatures	42
Grievance Procedures	44
Nutrition Services, Service Providers, and Senior Center/ Focal Points	45
Emergency Plan Summary.....	46
Direct Service Requests.....	47

Heritage Area Agency on Aging Update

Heritage Area Agency on Aging (Heritage) is a department of Kirkwood Community College and is designated by the Iowa Department on Aging's Commission on Aging as an area agency on aging. Area Agencies on Aging (AAAs) are established under the Older Americans Act of 1965 (revised 2016) to respond to the needs of older adults over the age 60 and family caregivers. Heritage is a designated Aging and Disability Resource Center (ADRC), branded as LifeLong Links, to enhance access to services for individuals with disabilities. Heritage Planning and Service Area includes Benton, Cedar, Iowa, Johnson, Jones, Linn, and Washington counties.

Heritage addresses our progress throughout this Area Plan update; however, Heritage and Kirkwood Community College have made progress on the evaluation of our current legal structure to ensure future opportunities, sustainability and an efficient organizational structure. On December 14, 2017, the Kirkwood Community College Board of Trustees passed a resolution approving a revised Memorandum of Understanding between Kirkwood Community College and Heritage. It also established an interim executive council to oversee and manage Heritage and to explore alternative structures and feasibility of Heritage becoming an independent 501(c)(3) nonprofit corporation. The discussion of Heritage changing its structure will continue with the Interim Executive Council and the guidance of the Iowa Department on Aging.

Heritage has begun some adjustments in staffing to meet the needs of our region. Adjustments include the resignation of Executive Director Joe Sample in June of 2017. Jill Sindt and Kellie Elliott-Kapparos are the appointed Interim Directors and continue serving in this capacity. With LifeLong Links fielding Information and Assistance calls, Heritage shifted an open position within the I&A team to focus in the Family Caregiver/Options Counseling program where the demand is greater. The Nutrition Department restructured with the assistance of a federal grant from the Administration for Community Living in partnership with Iowa Department on Aging to utilize grant dollars to fund half of a new Health and Wellness Coordinator position. This position will allow the Regional Nutrition Coordinator to focus solely on exploring innovation with congregate and home delivered meals and the new position will focus on health promotion, evidenced programming, nutrition education and other grants, including Innovations grant project. The LifeLong Links Senior Manager position was restructured to include the development and implementation of an outreach plan with particular focus on rural and underserved areas of our seven county region.

Heritage core priorities have not changed since the original Area Plan submission and we are excited to be able to communicate some of the successes we have already had this early into year one of this four-year plan.

- Heritage is the third agency in the state of Iowa to become SAGE certified. SAGE is a certification program that provides education on LGBT older adult issues. All staff are participating in this valuable program to help us better serve and advocate for individuals. We are very proud of this certification.
- Heritage is an active member of a committee led by the Department of Justice's, Dr. Brian Kaskie, studying Elder Abuse and Neglect (EAN). This group's work has transitioned

to the intensive interview phase and the desired outcome are clear and specific recommendations that the State of Iowa can act upon to better address and mediate issues of older adult abuse, neglect and exploitation.

- Heritage has begun work through the Nutrition Innovation Grant to create pilots to improve and enhance the energy and participation with congregate dining. The ultimate goal is to create a model and replicate it throughout the Heritage region.
- Heritage is expanding the congregate nutrition program to two sites in Marion (Linn County) through the Nutrition Innovations Grant. A renewed focus, excitement and additional staff are welcomed additions to improve our capacity to address the challenges of congregate meals.
- Heritage is seeing success with the Victims of Crime Act (VOCA) program as we are able to help individuals that we may have had limited ability to serve previously. Hours of direct client assistance have doubled and projected to increase.
- Heritage's partnership with a local senior housing facility, Arbor, has proven to be a success with Options Counselors meeting with all residents to ensure they have appropriate services and supports to allow them to live successfully in the home setting of their choice for as long as possible. This partnership has proved so beneficial to the residents of Arbor that Heritage has established two additional partnerships with senior housing facilities within our region.

With all successes achieved to date, there have been some unexpected challenges as well.

- We have seen some turnover in leadership of a number of our funded partner providers. This can be a challenge in program monitoring but it also allows for opportunities and new relationship building.
- The Prep-Wise project is very active with the University of Iowa. Prep-Wise is a program that is being developed to help older adults and their caregivers to better prepare for an emergency or disaster. Completion of these program materials will be an opportunity, however, with the changes in staffing for case management, a roll out as large as initially planned may be a challenge due to staff capacity.
- Title IIID funds have been limited and somewhat restricting. Staff bandwidth in the past has been a barrier for past utilization of funds, additional staff allows for opportunity. We hope this will eliminate barriers as we work on implementing the educational opportunities through congregate dining at our pilot sites.
- Transportation and Chore continue to be reported as great needs. However, the method in which Heritage funds these programs does not allow for our partner providers to expand staffing to be able to offer additional units of service, even when funding allows. The Heritage HCBS Area Plan Focus Group has meet with providers of Transportation and is working on recommendations to address this gap.

Heritage staff and volunteers are honored to continue to serve the older adults, adults with disabilities and caregivers in our region.

Section 1: Update on Strategies to Achieve 2018-2021 Goals

Goal 1: Iowa Aging Network will protect and enhance the rights; and prevent the abuse, neglect, and exploitation of older Iowans.

Prioritized Service Gaps

The Heritage Area Agency on Aging completed a needs assessment on November 16, 2016 to identify and prioritize service gaps to address during the plan period. Methods used to identify service gaps included: holding a public meeting to discuss the Area Plan and to establish Focus Groups. The purpose of the Focus Groups are to help program leadership, management, and the Advisory Council to further address aspects of the area plan as well as activities, goals, and measures that are not necessarily being tracked by the Iowa Department on Aging within the area plan yet, could be added to the area plan. Participants which included volunteers, other service providers and community advocates brainstormed and documented on paper service gaps and barriers, innovative models or possible solutions, and additional key interests. At the end of the day, participants received two stickers to identify which service gaps they believed to be the most critical. The same process was used within a staff retreat in December 2016 and all results shared with the Advisory Council. In mid-February 2017, each of the four focus groups met again and were asked what two (2) services gaps they thought Heritage should add to the Area Plan, what two (2) strategies would meet those service gaps, and what measures would determine progress on the strategies that Heritage and the Advisory Council could evaluate. Results from these meetings have been incorporated into the Area Plan. Meetings with the Focus Groups will be ongoing.

SERVICE GAP #1: Older adults in the Heritage service area experiencing elder abuse, neglect or financial exploitation do not have information to recognize signs of abuse or how to resolve their situation.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of EAPA Consultation units provided
- Creation of a Targeted Outreach Plan
- Creation of a new educational piece
- Number of Elder Rights presentations given

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
The Heritage Elder Rights Specialist will provide EAPA Consultation services to all EAPA Program referrals with the Heritage service area. (FY2018-2021)	No	In Progress
The Heritage Elder Rights Workgroup will identify target population most in need of EAPA information and services. (FY2018)	No	In Progress
The Heritage Elder Rights Workgroup will create educational materials that communicate how to identify signs of abuse and how to connect with EAPA services. (FY2019)	No	In Progress
The Heritage Elder Rights Workgroup will develop a plan for distributing informational materials to target population. (FY2020)	No	Not Started
The Heritage Elder Rights Specialist will deliver information to target population. (FY2021)	No	In Progress

Update on Strategy Activities to Date

- Elder Rights staff have given multiple presentations with key stakeholders and the general public.
- Heritage staff participate in “Illuminating the Elder Abuse Network Pathway in East Central Iowa Task Force” with Dr. Brian Kaskie, Fellow, Department of Justice and US Attorney’s Office, Jacob Schunk.
- Elder Rights staff have been providing outreach to key stakeholders and potential partners as they are identified but a targeted plan needs to be created.
- Elder Rights staff have increased efforts to offer training to law enforcement and first responders throughout the seven county region.

Strategy Activities Planned for SFY 2019

- Recruit an additional two or three key contacts to participate in the Elder Rights Focus Group and assist with review and implementation of area plan strategies.
- Utilize the Elder Rights Focus Group and the LifeLong Links Sr. Manager to develop a targeted outreach plan.
- Heritage will be having an advanced placement Master of Social graduate student from the University of Iowa join our agency from August 2018 through May 2019 and assist with outreach efforts.
- Develop an educational piece with feedback from the multidisciplinary teams and the Elder Right Focus Group to distribute.

- Continue to increase efforts to offer training to law enforcement and first responders throughout the seven county region.
- Continue participation in “Illuminating the Elder Abuse Network Pathway in East Central Iowa Task Force” with Dr. Brian Kaskie, Fellow, Department of Justice and US Attorney’s Office, Jacob Schunk.

SERVICE GAP #2: Older adults in the Heritage service area experiencing self-neglect issues of hoarding, homelessness, and bed bugs are difficult to reach and serve.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of brochures distributed to target population identified
- Number of presentations given to target population identified
- Number of multidisciplinary team meetings held

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
Use existing multidisciplinary team meetings to explore resources options in difficult, self-neglect cases. (FY2018-2021)	No	In Progress
The Heritage Elder Right Coordinator will establish a referral system and collaborative support plan with homeless service agencies in Linn and Johnson counties for older adults who are homeless or at risk for homeless. (FY2018)	No	Not Started
The Heritage Elder Rights Specialist will explore additional funding options for older adults experiencing self-neglect issues of hoarding and bed bugs. (FY2018)	No	Not Started
Use existing multidisciplinary team meetings to create educational materials that communicate how to identify signs of self-neglect and how to connect with EAPA services. (FY2019)	No	Not Started
The Heritage Elder Rights Workgroup will develop an outreach plan for distributing informational materials to older adults with self-neglect issues. (FY2020)	No	In Progress

Current Strategies	Revised or New Strategy?	Status
The Heritage Elder Rights Specialist will distribute information to older adults with reported self-neglect issues. (FY2021)	No	In Progress

Update on Strategy Activities to Date

- On October 17, 2017, Heritage staff met with the Elder Rights Focus Group to review area plan strategies and to discuss outreach planning.
- Multidisciplinary teams have been re-evaluated and energized with new staff facilitation and the clarification of roles and purpose. There are three external teams: Linn county, Johnson county, and rural counties.
- Heritage has begun an internal multidisciplinary team that meets at least monthly. Such a team was not in existence before.
- Elder Rights staff have given multiple presentations with key stakeholders and the general public.
- Heritage has been able to serve individual consumers with financial assistance through material aid in certain circumstances to address hoarding and infestations as funding allows.
- On January 29, 2018, the Heritage Agency hired an EPA Elder Rights Specialist. This will build our agency’s capacity to address the remaining FY2018 strategies before the end of the fiscal year.

Strategy Activities Planned for SFY 2019

- Recruit an additional two or three key contacts to participate in the Elder Rights Focus Group and assist with review and implementation of area plan strategies.
- Utilize the Elder Rights Focus Group and the LifeLong Links Sr. Manager to assist in the development of a targeted outreach plan.
- Heritage will be having an advanced placement Master of Social graduate student from the University of Iowa join our agency from August 2018 through May 2019 and assist with outreach efforts.

SERVICE GAP #3: Older adults in the Heritage service area who are caring for adult children with disabilities are not aware of available resources.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of brochures distributed to caregivers who are caring for an adult child living with a disability
- Number of caregiver presentations held for caregivers who are caring for an adult child living with a disability

- Number of brochures distributed to legal services providers
- Number of referral to Elder Rights services from legal service providers

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
The Heritage Elder Rights Workgroup will identify common issues for older adults who are caring for adult children with disabilities. (FY2018)	Yes	In Progress
The Heritage Elder Rights Workgroup to create educational materials that communicate how to care for adult children with disabilities and how to connect with Heritage to explore services options. (FY2019)	Yes	In Progress
The Heritage Elder Rights Coordinator will distribute materials to legal assistance agencies to share with older Adult who are caring for adult children with disabilities. (FY2020-2021)	No	Not Started
The Legal Services Provider will work with Heritage staff, Options Counselors and Elder Rights Workers to provide education to those seeking services of legal assistance.	No	In Progress

Update on Strategy Activities to Date

- Heritage combined efforts for two Service Gap 3 strategies stated above as they overlapped other Committee efforts. Listed below are activities related to these strategies:
 - On January 31, 2017, Julie Christensen presented needs and gaps of caregivers of persons living with disabilities to the Caregiver Planning Committee. Elder Rights workgroup members were also invited to attend. The Committee then developed a common list of needs/gaps based on the discussion. The Heritage Caregiver Support Program brochure was also reviewed and input was captured on needed changes.
 - On February 22nd, 2017, the Caregiver Planning Committee met to further discuss common issues for older adults caring for their adult children with disabilities and identify a priority issue. The committee recommended to start with understanding what existing supports are available to help adults living with a disability transition from High School to living on their own after they graduate. Strategies to address this need will include: surveying high schools to identify what current transition supports exist, estimating cost of transition programing/resources and identify what resources The Heritage Agency can create and/or provide to address this identified gap.

- Martha Quint, Heritage’s Legal Service Provider, is actively involved in Heritage MDT teams and accepts referrals and consults with Heritage staff regularly. This successful relationship continues.
- Heritage is building a relationship with Iowa Legal Aid’s local Cedar Rapids office through other committee involvement with disaster preparedness. Both organizations are interested in having a training for their staff – Heritage to learn about Legal Aid and Legal Aid to learn about Heritage.

Strategy Activities Planned for SFY 2019

- To have a training offered to Legal Aid, Cedar Rapids office.
- To invite Legal Aid, Cedar Rapids office to a Heritage staff meeting to provide training on services they offer.
- Explore ways to connect with the Legal Clinic at the University of Iowa.

Goal 2: Iowa Aging Network will work with older Iowans, Iowans with disabilities, and caregivers as they fully engage and participate in their communities, make informed decisions, and exercise self-determination and control about their independence, well-being, and health.

Prioritized Service Gaps

The Heritage Area Agency on Aging completed a needs assessment on November 16, 2016 to identify and prioritize service gaps to address during the plan period. Methods used to identify service gaps included: holding a public meeting to discuss the Area Plan and to establish Focus Groups. The purpose of the Focus Groups is to help program leadership, management, and the Advisory Council to further address aspects of the area plan as well as activities, goals, and measures that are not necessarily being tracked by the Iowa Department on Aging within the area plan yet, could be added to the area plan. Participants which included volunteers, other service providers and community advocates brainstormed and documented on paper service gaps and barriers, innovative models or possible solutions, and additional key interests. At the end of the day, participants received two stickers to identify which service gaps they believed to be the most critical. The same process was used within a staff retreat in December 2016 and all results shared with the Advisory Council. In mid-February 2017, each of the four focus groups met again and were asked what two (2) services gaps they thought Heritage should add to the Area Plan, what two (2) strategies would meet those service gaps, and what measures would determine progress on the strategies that Heritage and the Advisory Council could evaluate. Results from these meetings have been incorporated into the Area Plan. Meetings with the Focus Groups will be ongoing.

SERVICE GAP #1: Older adults within the Heritage rural county service areas do not know about the LifeLong Links Program or how to connect to services.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of outreach events attended
- Number of agency presentations held
- Number of agency brochures distributed
- Number of website views
- Number of calls and percentage of calls by total population of each service county for persons 60 yrs. and over, adults living with disabilities, and family caregivers

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
LifeLong Links Advisory Council will assist in creating a user-friendly website for older adults, adults living with disabilities and caregivers to access information on available services. (FY2018-2021)	No	In Progress
Increase Heritage’s presence within rural counties by having staff attend meetings on a more regular basis and present on LifeLong Links services. (FY2018-2021)	No	In Progress
LifeLong Links Advisory Council will develop materials to use in educating rural older adults about LifeLong Links and how to connect with services. (FY2018)	No	In Process
LifeLong Links Advisory Council will create a rural outreach plan to increase awareness of LifeLong Links with the following counties: Benton, Cedar, Iowa, Jones, and Washington. (FY2019)	No	Not Started
Heritage staff will distribute materials at congregate meals sites within rural counties. (FY2020-2021)	No	Not Started

Update on Strategy Activities to Date

- On August 17, 2017, the LifeLong Links – ADRC Advisory Council reviewed and discuss area plan strategies and outcome measurements and determine to first begin working on creating a user-friendly website.

- On October 4, 2017, Heritage staff met with Kirkwood Marketing team to gather additional information on cost of Agency’s website redesign. Staff also reviewed Section 508 of the Rehabilitation Act website standards to ensure marketing staff would be able to assist the agency with compliance.
- On October 9, 2017, a LifeLong Links Area Plan Workgroup meeting was held to brainstorm strategies on how to create a user-friendly website. Materials used within the discussion included: PowerPoint presentation on “How Senior Friendly is Your Website?” created by National Institute on Aging. The group also reviewed six other Area Agency on Aging’s website from around the country and ideas the group wanted to incorporate into the new website were captured.
- Heritage Staff created a website template based on focus group input and made changes to the draft website that had been purchased.
- On November 10, 2017, Heritage staff met with Kirkwood Marketing to review changes that had been made to draft website and also share input from focus group.
- On Dec. 11, 2017, Heritage staff met with United Way 2-1-1 staff to review IDA consumer reporting requirements and discuss how to increase the number of consumer intake forms completed for their I&A calls. United Way 2-1-1 staff developed a process to account for duplication within their aggregate data using available information such as name, county, DOB, etc.
- In February 14, 2018, Heritage staff met with Kirkwood Marketing to review process on website.
- On February 15, 2018, Heritage staff met with LifeLong Links – ADRC Advisory Council to review website changes and received additional input. Within this meeting the Heritage agency brochure was reviewed and input on needed changes was captured. Additional materials to use in educating rural counties about agency services was discussed.

Strategy Activities Planned for SFY 2019

- Continue to attend meetings within rural counties and present on agency services.
- Create rural outreach plan to increase awareness of agency services in Benton, Cedar, Iowa, Jones, and Washington counties.
- Distribute agency materials at congregate meal sites within rural counties.

SERVICE GAP #2: Caregivers within the Heritage services area do not know about the Caregiver Support Program or how to connect to services.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of caregiver outreach events attended
- Number of caregiver presentations held
- Number of caregiver brochures distributed

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
The Heritage Caregiver Planning Committee will develop materials to use in educating caregivers about the Heritage Caregiver Support program and how to connect with services. (FY2018)	No	In Progress
The Heritage Caregiver Planning Committee will develop an outreach plan to increase awareness of LifeLong Links with the following counties: Benton, Cedar, Iowa, Jones, and Washington. (FY2019)	No	In Progress
Heritage staff distribute materials to the Family Caregiver Center of Mercy, Hospitals, doctors' offices, other local health, and human service agencies. (FY2020-2021)	No	In Progress
Heritage will explore, implement and expand fee-for-service programs for caregivers. (FY2018-2021)	No	In Progress

Update on Strategy Activities to Date

- On December 13, 2017, Heritage staff met with the Caregiver Planning Committee to discuss caregiver data, current caregiver efforts and review Area Plan strategies and outcomes.
- On January 31, 2018, the Heritage Caregiver Support Program brochure was reviewed by the Caregiver Planning Committee and input was captured on needed changes.
- On January 29, 2018, the Heritage Agency hired a second Family Caregiver Specialist/Options Counselor to increase service capacity and outreach and to energize relationship building.
- In January 2018, Heritage started to explore models of practice for implementing fee-for-service programs for caregivers.
- In March 2018, new Caregiver Support Program brochures were distributed to the Family Caregiver Center of Mercy, Hospitals, doctors' offices, other local health, and human service agencies.

Strategy Activities Planned for SFY 2019

- To continue to explore fee-for-service programs for caregivers.
- To assist with outreach to rural caregivers and spread information about the Heritage Caregiver Support Program throughout our service region.

SERVICE GAP #3: Caregivers within the Heritage services area lack caregiver training opportunities and resources.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of Powerful Tools for Caregiver trainings held
- Number of caregivers who participated in Powerful Tools for Caregiver trainings

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
Expand Powerful Tools for Caregivers training into rural counties including: Benton, Cedar, Iowa, Jones, Washington counties. (FY2018-2021)	No	In Progress
Develop partnership with Iowa Association of Community Providers to create a formalized online training for caregivers that provides specific knowledge regarding the populations that are being cared for. (FY2018-2021)	No	Not started
Heritage will explore, implement and expand fee-for-service programs for caregivers. (FY2018-2021)	No	In Progress

Update on Strategy Activities to Date

- On May 8, 2017, completed initial rural outreach in Washington Co. to 15 caregivers for the Powerful Tools for Caregivers course.
- On August 1, 2017 Heritage offered a six week course of Powerful Tools for Caregivers in partnership with the ISU Extension and Outreach Office as well as the University of Iowa Family Services. Twenty working caregivers were in attendance.
- In January 2018, Heritage started to explore models of practice for implementing fee-for-service programs for caregivers.
- In March 2018, our Family Caregiver Specialist/Options Counselor started attending a Jones Co. Human Resource meeting and explore options to present on Heritage Caregiver Support program in a future meeting.

Strategy Activities Planned for SFY 2019

- Heritage will continue to teach Powerful Tools for Caregivers and expand to teaching in the rural service areas.
- Explore online caregiver training options with the Iowa Association of Community Providers.

SERVICE GAP #4: High nutrition risk individuals within the Heritage service area lack sufficient nutrition education and nutrition counseling.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- The number of consumers participating in the Nutrition Counseling Program listed on monthly report
- The number of completed Consumer Intake Forms received on a monthly basis
- The number of outreach events/marketing materials distributed

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
Expand Nutrition Counseling services through HY-VEE to all seven counties. (FY2018-2021)	No	In Progress
Expand Nutrition Education offerings to caregiver groups through the Heritage Caregiver Planning Committee and Family Caregiver Center of Mercy, Hospitals, doctors’ offices, other local health, and human service agencies that see persons that are at nutritional risk. (FY2018-2021)	No	In Progress
Work with Elder Rights Specialists to utilize nutrition risk screening tool with those consumers in the EAPAP.	No	In Progress

Update on Strategy Activities to Date

- A presentation discussing the Nutrition Counseling Program, was made at the quarterly nutrition site manager’s meeting in June, 2017 and again at the October, 2017 meeting. Additionally, it was discussed in-depth, at the annual Fresh Conversations Facilitator training.
- Nutrition education was a main focus of the Heritage booth at the annual Caregiver Wellness Day event on November 16, 2017.
- The Regional Nutrition Director conducted a training on nutrition risk scores and available resources to internal EAPAP staff and Options Counselors in November 2017.
- A presentation on available nutrition and nutrition education services was conducted at the SIMS/TAV Health Advisory Committee on 1/16/18.
- Nutrition Counseling was one of the programs featured at a local health fair on 1/20/18.

Strategy Activities Planned for SFY 2019

- Continue to use the recently developed procedure of monitoring the High Nutrition Risk information on a monthly bases and reach out to those participants on an individual basis, educating them on available resources. Program expansion will be dependent upon identified needs of consumers throughout the Heritage region.
- Heritage will use the Nutrition Innovation Grant as a catalyst to expand the reach of its nutrition education programming and marketing efforts through an increased focus of networking with and providing information on available resources to various community partners such as local health and human service agencies, and physician offices and hospitals.

Goal 3: Iowa Aging Network will enable Older Iowans to remain in their own residence and community of choice.

Prioritized Service Gaps

The Heritage Area Agency on Aging completed a needs assessment on November 16, 2016 to identify and prioritize service gaps to address during the plan period. Methods used to identify service gaps included: holding a public meeting to discuss the Area Plan and to establish Focus Groups. The purpose of the Focus Groups is to help program leadership, management, and the Advisory Council to further address aspects of the area plan as well as activities, goals, and measures that are not necessarily being tracked by the Iowa Department on Aging within the area plan yet, could be added to the area plan. Participants which included volunteers, other service providers and community advocates brainstormed and documented on paper service gaps and barriers, innovative models or possible solutions, and additional key interests. At the end of the day, participants received two stickers to identify which service gaps they believed to be the most critical. The same process was used within a staff retreat in December 2016 and all results shared with the Advisory Council. In mid-February 2017, each of the four focus groups met again and were asked what two (2) services gaps they thought Heritage should add to the Area Plan, what two (2) strategies would meet those service gaps, and what measures would determine progress on the strategies that Heritage and the Advisory Council could evaluate. Results from these meetings have been incorporated into the Area Plan. Meetings with the Focus Groups will be ongoing.

SERVICE GAP #1: Older adults within the Heritage service area lack affordable non-medical transportation options on evening and weekends.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of HCBS Focus Group meetings held with current contracted providers

- Creation of a report of findings/recommendations from current providers and HCBS Focus Group members

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
Assess current providers’ ability to increase services and identify how they might be able to increase transportation and non-medical supports and services. (FY2018-2019)	No	In Progress
Identify and survey non-contracted community-based organizations, faith-based organizations, and businesses (stakeholders) about their ability to invest in non-medical supports and services for older adults. (FY2018-2019)	No	Not Started
Utilize stakeholder survey results to develop a community engagement plan that enhances volunteerism and community participation in transportation and non-medical supports and services. (FY2020)	No	Not Started
Host at least two (2) focus group meetings with current contracted providers regarding issues related to expanding transportation services and non-medical supports and services in their respective communities. (FY2021)	No	In Progress

Update on Strategy Activities to Date

- On November 1, 2017, staff met with the HCBS Focus Group to discuss our goals and desired outcomes of the group’s efforts. It was determined that it would be important to schedule a joint meeting the current Heritage transportation providers.
- On December 6, 2017, staff met with the HCBS Focus Group and all but one of the Heritage transportation providers. Topics that were discussed included: What is the Perfect State, Barriers & Needs, What Works Now, and General Recommendations.
- Heritage explored funding opportunities with local Transportation Advisory Group (TAG) to address unmet transportation needs.
- Heritage staff leads the Johnson County Livable Community’s Policy Board efforts that addresses transportation needs within Johnson Co. Heritage staff attend the Transportation Action Team meetings.

Strategy Activities Planned for SFY 2019

- Create a written report for review of those participating in the December 6, 2017 meeting for additional feedback with a second meeting.

- Final version completed by end of the fiscal year for presentation to volunteer leadership.
- Relationship building with other groups working on transportation needs.
- Further consideration of stakeholder survey strategies.

SERVICE GAP #2: Working caregivers within the Heritage service area lack knowledge on how to access available resources to assist with caregiving.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of working caregivers who received information regarding the Heritage Caregiver Support Program
- Number of on-site caregiver trainings held
- Number of caregivers enrolled in fee-for-service program(s)

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
Increase access to information and services for working caregivers. (FY2018-2019)	No	In Progress
Develop a marketing and outreach plan to promote program for working caregivers. (FY2020)	No	Not Started
Use Family Caregiver Specialist to provide on-site services to employers. (FY2021)	No	Not Started
Heritage will explore, implement and expand fee-for-service programs for caregivers. (FY2018-2021)	No	In Progress

Update on Strategy Activities to Date

- On August 1, 2017 Heritage delivered a six week course of Powerful Tools for Caregivers in partnership with the ISU Extension and Outreach Office and the University of Iowa Family Services Dept. with 20 working caregivers in attendance.
- In January 2018, Heritage started to explore models of practice for implementing fee-for-service programs for caregivers.
- On March 1, 2018 the Family Caregiver Specialist attended the 32nd Annual Professional Women’s Network Colleague Event to share information on the Family Caregiver Program and working caregivers.

Strategy Activities Planned for SFY 2019

- Continue to increase access to information and services for working caregivers.
- Continue to explore fee-for-service programs for caregivers.
- Research working caregiver programs offered in other states.

SERVICE GAP #3: Caregivers who care for adult children with disabilities within the Heritage service area lack knowledge on how to access available resources.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of caregivers who attend Caregiver Wellness Day and are caring for an adult children living with a disability
- Number of brochures distributed to caregivers who are caring for an adult child living with a disability
- Number of caregiver presentations held for caregivers who are caring for an adult child living with a disability
- Number of older adults who received ADRC Unmet Needs funding to care for their adult child living with a disability.
- Number of caregivers who care for an adult child living with a disability who received services through the Heritage Caregiver Support Program.

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
The Heritage Caregiver Planning Committee will offer input on list of common issues for older adults who are caring for adult children with disabilities. (FY2018)	No	In Progress
The Heritage Caregiver Planning Committee will offer input on educational materials that communicate how to care for adult children with disabilities and how to connect with Heritage to explore services options. (FY2019)	No	In Progress
The Heritage Caregiver Planning Committee will help distribute materials to health and human service agencies to share with older adult who are caring for adult children with disabilities. (FY2020-2021)	No	Not Started
Heritage will continue to utilize ADRC Unmet Needs funds to serve older adults who are caring for adult children with disabilities. (FY2018-2021)	No	In Progress

Current Strategies	Revised or New Strategy?	Status
The Heritage Agency will keep track of the number of cases where the Family Caregiver Specialist delivers service to older adults who are caring for an adult children with disabilities. We will consider using requesting OAA Title III funds to provide GO access assistance, GO counseling, CO respite, etc. if there is a demonstrate need within our service area. (FY2018-2021)	No	In Progress
Heritage will explore, implement and expand fee-for-service programs for caregivers. (FY2018-2021)	No	In Progress

Update on Strategy Activities to Date

- For the current fiscal year, \$20,000 was made available to address ADRC Unmet Need requests for adults living with disabilities. As of April 2018, eight persons received \$14,910.21 in home and community based services to help maintain their health and independence.
- On December 13, 2017, Heritage staff met with the Caregiver Planning Committee to discuss caregiver data, current caregiver efforts and review Area Plan strategies and outcomes.
- On January 31, 2018, Julie Christensen presented needs and gaps of caregivers of persons living with disabilities to the Caregiver Planning Committee. The Committee then developed a common list of needs/gaps based on the discussion. The Heritage Caregiver Support Program brochure was also reviewed and input was captured on needed changes.
- In January 2018, Heritage started to explore models of practice for implementing fee-for-service programs for caregivers.
- On February 22nd, 2017, the Caregiver Planning Committee met to further discuss common issues for older adults caring for their adult children with disabilities and identify a priority issue. The committee recommended to start with understanding what existing supports are available to help adults living with a disability transition from High School to living on their own after they graduate. Strategies to address this need will include: surveying high schools to identify what current transition supports exist, estimating cost of transition programing/resources and identify what resources The Heritage Agency can create and/or provide to address this identified gap.

Strategy Activities Planned for SFY 2019

- The Heritage Caregiver Planning Committee will offer input on educational materials that communicate how to care for adult children with disabilities and how to connect with Heritage to explore services options.

- Continue to explore fee-for-service programs for caregivers.

SERVICE GAP #4: Older Adults within the Heritage service area need access to nutritious meals.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of surveys distributed to participants
- Number of surveys returned by participants
- Amount of savings per case/pound of food products
- Purchase history of each item on “preferred product” list reviewed on a quarterly basis

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
Survey older adults regarding a wide range of issues related to nutrition services that include aspects of attitudes toward accessing congregate meal sites, types of places they tend to “congregate” with other older adults for meals, and what would motivate them to congregate for meals as they age. (FY2018-2019)	No	In Progress
Compare findings to national data to develop a strategy for recommended changes in the model of nutrition meal programs. (FY2019)	No	In Progress
Create training and education modules that addresses stigma in receiving meal services and for providers and the community to promote changes within the congregate model based on findings. (FY2020-2021)	No	Not Started
Establish communication plan with urban/rural media about the report findings and proposed changes in communities. (FY2021)	No	Not Started
Work with subcontracted nutrition providers to evaluate food costs and opportunities to minimize them. (FY2018-2021)	No	In Progress
Work towards a needs assessment in determining food deserts for seniors and work to alleviate them by opening dining sites or existing congregations point such as HY-VEE, local	No	In Progress

Current Strategies	Revised or New Strategy?	Status
restaurants to offer OAA meals to seniors in the food insecure areas. (FY2018-2021)		

Update on Strategy Activities to Date

- The Nutrition Area Plan Focus Group met and discussed the needs of the region, how to expand the reach of the focus group, and also the benefits of Heritage partnering on the ACL Nutrition Innovation Grant.
- Participant survey distributed and due back by 2/1/17. Data analysis to occur through May 2018.
- Heritage continues to meet regularly with food brokers and food manufacturers on creating purchasing programs for food products as much as possible. At least two purchasing programs have been established with national food manufacturers in FY 2018.
- Heritage has also expanded the reach of its Senior Tote Program to additional rural counties of the service area and has also expanded the monthly offerings to include a selection of fresh produce, and increased the amount of shelf-stable food that is offered in each tote bag.
- A “prefer product list” is in the development process for providers to use in purchasing food products. These items will have discounts associated with them and the more a product is purchased, the lower the cost of the product.
- Heritage partnered with Linn County and the Senior Meal Advisory Committee to produce a GIS map of senior dining locations, food pantries, mobile food pantries, and feeding programs throughout Linn County. The Advisory Committee consists of representative from Linn County Community Support Services, the City of Cedar Rapids, The Heritage Area Agency on Aging, and the three nutrition subcontractors that currently provide services in Linn County.
- In late March, two congregate dining sites were opened in Marion, Iowa. The Marion Public Library and Marion-Lowe Park, will alternate service days and offer nutrition education and evidence-based programming. Marion-Lowe Park was previously an OAA congregate dining site, but was closed in 2012. The Marion Public Library site is a new location, as a result of a new collaboration of the Mayor and City of Marion, The Marion Public Library, and The Heritage Agency on Aging.
- Heritage received a two-year federal grant to find solutions and innovate ways to offering congregate meals in Linn County. Heritage was one of four in the country that received this type of grant.

Strategy Activities Planned for SFY 2019

- Continue meeting with food brokers and manufacturers to develop additional cost saving opportunities.

- Analyze data from participant survey and develop training/educational modules for established dining sites and providers.
- Continue developing a region-wide community needs assessment for the nutrition program.
- Strategic planning will be conducted to determine the appropriate location of opening an additional congregate dining site in the western edge of Linn County, with a potential opening timeline of Fall 2018.
- Continue to work through the Nutrition Innovation Grant to create pilots to improve and enhance the energy and participation with congregate dining. The ultimate goal is to create a model that can be replicated throughout the Heritage region.
- Expand the congregate nutrition program to two sites in Marion (Linn County) through the Nutrition Innovations Grant. A renewed focus, excitement and additional staff are welcomed additions to improve our capacity to address the challenges of congregate meals.

SERVICE GAP #5: The Heritage Agency needs to increase access to information, education and advocacy efforts within the service area.

Indicators to gauge progress in addressing service gap

Agency is reviewing these indicators to determine whether progress is being made in addressing the service gap:

- Number of outreach events attended
- Number of agency presentations held
- Number of agency brochures distributed
- Number of website views
- Number of calls and percentage of calls by total population of each service county for persons 60 yrs. and over, adults living with disabilities, and family caregivers

Strategies to Address Service Gap

Current Strategies	Revised or New Strategy?	Status
The Heritage Agency will launch a new website to strengthen its education and outreach efforts throughout the PSA with timely information about services, advocacy efforts, and educational opportunities for older adults, individuals with disabilities, and family caregivers. (FY2018-2021)	No	In Progress

Update on Strategy Activities to Date

- On August 17, 2017, the LifeLong Links – ADRC Advisory Council reviewed and discuss area plan strategies and outcome measurements and determine to first begin working on creating a user-friendly website.
- On October 4, 2017, Heritage staff met with Kirkwood Marketing team to gather additional information on cost of Agency’s website redesign. Staff also reviewed Section 508 of the Rehabilitation Act website standards to ensure marketing staff would be able to assist the agency with compliance.
- Included in the FY18 budget was \$3,000 to redesign the Heritage Area Agency website.
- On October 9, 2017, a LifeLong Links Area Plan Workgroup meeting was held to brainstorm strategies on how to create a user-friendly website. Materials used within the discussion included: PowerPoint presentation on “How Senior Friendly is Your Website?” created by National Institute on Aging. The group also reviewed six other Area Agency on Aging’s website from around the country and ideas the group wanted to incorporate into the new website were captured.
- Heritage Staff created a website template based on focus group input and made changes to the draft website that had been purchased.
- On November 10, 2017, Heritage staff met with Kirkwood Marketing to review changes that had been made to draft website and also share input from focus group.
- In February 2018, Heritage staff met with Kirkwood Marketing to review process on website.
- On February 15, 2018, Heritage staff met with LifeLong Links – ADRC Advisory Council to review website changes and received additional input.

Strategy Activities Planned for SFY 2019

- Promote website on agency brochures, social media, and in community presentations.
- Heritage will be having an advanced placement Master of Social graduate student from the University of Iowa join our agency from August 2018 through May 2019 and assist with outreach efforts.

Section 2: Performance and Service Projections

Performance Outcome & Fiscal Year Targets

Goal: *Iowa Aging Network will protect and enhance the rights; and prevent the abuse, neglect, and exploitation of older Iowans.*

Program: Elder Abuse Prevention and Awareness (EAPA)

Performance Outcome: Consumer is able to use information & referrals for self-advocacy in resolving abuse, neglect, or exploitation situation.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Percentage of EAPA Consultation consumers whose needs are met through provider referrals.	90%	95.2%	90%

Progress to date:

Heritage is above target and will maintain the same goal for SFY 2019.

Performance Outcome: Consumer's abuse, neglect, or exploitation situation is resolved.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Percentage of EAPA Assessment & Intervention consumer cases closed with EAPA services no longer needed.	50%	45.6%	50%

Progress to date:

Heritage is only slightly below target and will maintain the same goal for SFY 2019.

Goal: Iowa Aging Network will work with older Iowans, Iowans with disabilities, and caregivers as they fully engage and participate in their communities, make informed decisions, and exercise self-determination and control about their independence, well-being, and health.

Program: LifeLong Links

Performance Outcome: Consumer received information appropriate to their need.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Percentage of LifeLong Links callers indicating they received the information they were seeking.	85%	100%	85%

Progress to date:

Heritage is above target and will maintain the same goal for SFY 2019.

Performance Outcome: Consumer directed the interactive process to obtain guidance in their deliberations on making informed choices about long-term supports.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Percentage of Options Counseling consumers who indicate they were provided information to make an informed decision on goal and service need.	80%	100%	80%

Progress to date:

Heritage is above target and will maintain the same goal for SFY 2019.

Service(s): Nutrition Education and Nutrition Counseling

Performance Outcome: Consumers who are at risk for poor nutrition and health status receive information so that they have better health enhancing options.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Of all congregate meal consumers identified as high nutrition risk, percentage receiving nutrition education.	65%	68.6%	65%

Progress to date:

Heritage is slightly above target and intends to maintain the same goal for SFY 2019, with its current efforts.

Performance Outcome: Consumers who are at risk for poor nutrition and health status receive nutrition counseling so that they have the opportunity to improve their health literacy and information for optimal nutrient intake.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Change in consumers receiving nutrition counseling from previous FY (percentage and number).	100%	2,300%* (23)	200% (47)

Progress to date:

With Heritage’s evolving relationship with HY-VEE Dieticians, and the new methods of reviewing nutrition risk score data and conducting targeted contacts, Heritage anticipates an increase over what will be served in SFY '18.

**Note: In the previous year, Heritage served zero consumers. As of December 31, 2017 Heritage has served 23 consumers, which reflects a growth of 2,300%.*

Goal: Iowa Aging Network will enable Older Iowans to remain in their own residence and community of choice.

Service: Case Management

Performance Outcome: Case Management consumers receive supports and services for as long as they need or desire them in order to remain in their residence of choice.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Percentage of Case Management cases closed because case management service was no longer needed.	75%	33.3%	50%

Progress to date:

This target is low due to only having such few individuals discharged from case management. We anticipate that by the end of the year, all discharges should be considered and the data set will more accurately reflect the positive impact our program has on individuals to remain in their residence of choice. Because of this better understanding of the data, we will adjust our target down by 25%.

Performance Outcome: Case Management consumers receive supports and services for as long as they need or desire them in order to remain in their residence of choice.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Average number of months a Case Management consumer experiencing independent living impairments is able to remain safely at home prior to transitioning to facility.	54	90	54

Progress to date:

Heritage based our initial target on the data point that was collected in Seamless as the average length of stay in the program, which included currently enrolled consumers and not just those that had been discharged. While we are far above target, we will maintain the same target as we get a longer trend of this outcome.

Service(s): Congregate Meal and Home Delivered Meal

Performance Outcome: Congregate meal consumers who are potentially socially isolated have the opportunity to socialize in their community.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Of congregate meal consumers served who may be socially isolated, percentage eating 4 meals at meal site in a month.	45%	90%	90%

Progress to date:

Heritage anticipates an increase of current participant usage through a variety of current and planned efforts to reinvigorate the congregate program.

Performance Outcome: Home delivered meal consumers who are potentially socially isolated receive regular contact with a meal delivery person.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Of home delivered meal consumers served who may be socially isolated, percentage receiving at least 8 meals in a month.	65%	82.1%	75%

Progress to date:

Heritage is making concerted efforts to collaborate with its nutrition providers to use various tools in order to obtain accurate information that allows informed decisions to be made in determining the consumer’s level of service on an individualized basis.

Service(s): Caregiver Counseling and Caregiver Respite Care

Performance Outcome: Caregivers receive the supports and services they need to continue to provide informal care to the care recipient.

Performance Outcome Measure	SFY 2018 Target	Result as of 12/31/17:	SFY 2019 Target
Percentage of caregiver consumers indicating caregiver counseling and/or respite care service allowed them to maintain their caregiver role.	80%	97.2%	80%

Progress to date:

Heritage is above target and will maintain the same goal for SFY 2019.

SFY 2019 Projected Older Americans Act Consumers and Service Units

Form 3A-1

SERVICE		Service Units Provided	Consumers Served	60+ Rural	60+ Minority	60+ Minority Below Poverty	60+ Below Poverty
01A: Administration	General Aging						
	Caregiver						
1: Personal Care	General Aging	1	1	1	1	1	1
2: Homemaker	General Aging	1	1	1	1	1	1
3: Chore	General Aging	1,187	100	2	4	2	22
4: Home Delivered Meals	General Aging	258,398	1,623	169	49	30	459
5: Adult Daycare	General Aging	10,100	80	3	1	1	8
6: Case Management	General Aging	700	40	8	4	3	16
7: Congregate Meals	General Aging	55,104	921	239	9	8	193
8: Nutrition Counseling	General Aging	80	70	1	2	1	1
9: Assisted Transportation	General Aging	1,707	230	16	1	1	24
10: Transportation	General Aging	6,466	223	19	8	3	46
11: Legal Assistance	General Aging	792	420				
12: Nutrition Education	General Aging	13,000	2,100	310	48	31	508
13: Information & Assistance	General Aging	3,000	2,500	79	48	24	275
14: Outreach	General Aging	5,653	5,653				
B02: Health Promotion & Disease Prevention	General Aging	20	20	1	1	1	1
B07: Evidence Based Health Activities	General Aging	20	20	1	1	1	1
C07: EAPA Consultation	General Aging	40	40	6	1	1	8
C08: EAPA Assessment & Intervention	General Aging	150	40	8	1	1	7
C09: EAPA Training & Education	General Aging	30	500				
C10: Self-Directed Care	General Aging						
C12: EAPA Non-Consumer Consultation	General Aging	50	50	9	1	1	9
D01: Training & Education	General Aging	195	8,452				
E05: Options Counseling	General Aging	450	270	14	8	1	35
F02: Material Aide	General Aging	1	1	1	1	1	1
CG1: CG Access Assistance	Caregiver	280	150	2	2		1
CG2: CG Self-Directed Care	Caregiver						
CG3: CG Counseling	Caregiver	34	30	1	1	1	1
CG4: CG Information Services	Caregiver	40	1,200				
CG5: CG Respite	Caregiver	14,120	172	6	2	1	1
CG6: CG Supplemental Services	Caregiver	1	1	1	1	1	1
CG7: CG Home Delivered Meals	Caregiver						
CG8: CG Options Counseling	Caregiver	350	250	6	4	1	3
G01: GO Access Assistance	Caregiver						
G02: GO Self-Directed Care	Caregiver						
G03: GO Counseling	Caregiver						
G04: GO Information Services	Caregiver						
G05: GO Respite	Caregiver						
G06: GO Supplemental Services	Caregiver						
G07: GO Home Delivered Meals	Caregiver						
G08: GO Options Counseling	Caregiver						

Service Coverage & Wait List Information

Service Coverage Changes

Based upon the Heritage RFP submissions from our partner agencies, Heritage will be expanding Chore and Transportation into Johnson County.

An "X" indicates the service is offered in the county.

Mandatory Services	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
Case Management	X	X	X	X	X	X	X
Congregate Meals	X	X	X	X	X	X	
Health Promotion & Disease Prevention	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 Services	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
Adult Day Care/Adult Day Health	X	X	X	X	X	X	X
Chore				X		X	
EAPA Consultation	X	X	X	X	X	X	X
EAPA Assessment & Intervention	X	X	X	X	X	X	X
EAPA Training & Education	X	X	X	X	X	X	X
Evidence-Based Health Activities	X	X	X	X	X	X	X
Health Promotion and Disease Prevention	X	X	X	X	X	X	X
Homemaker	X	X	X	X	X	X	X
Material Aid	X	X	X	X	X	X	X
Outreach	X	X	X	X	X	X	X
Personal Care	X	X	X	X	X	X	X
Self-Directed Care							
Training & Education	X	X	X	X	X	X	X
Assisted Transportation	X				X		
Transportation		X		X		X	

Family Caregiver & Grandparent/Other Elderly Caregivers	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
Access Assistance	X	X	X	X	X	X	X

Family Caregiver & Grandparent/Other Elderly Caregivers	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
Counseling	X	X	X	X	X	X	X
Home Delivered Meal							
Information Services	X	X	X	X	X	X	X
Options Counseling	X	X	X	X	X	X	X
Respite Care	X	X	X	X	X	X	X
Self-Directed Care							
Supplemental services	X	X	X	X	X	X	X

Grandparent/Other Elderly Caregivers	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
Access Assistance							
Counseling							
Home Delivered Meal							
Information Services							
Options Counseling							
Respite Care							
Self-Directed Care							
Supplemental services							

Area Plan Service Waiting List

Heritage has been able to avoid a Waiting List at this point in the fiscal year. We do continue to anticipate a list for Case Management during this fiscal year. We also anticipate creating a Waiting List for Heritage Person Centered dollars, which offer financial assistance to Heritage consumers for such services as material aid, homemaker, and more in FY2019 based on state budget cuts.

Section 3: Quality Management

Agency staff reviewed the quality management activities that will be undertaken during the plan period and determined that the information is current. (No additional information is required.)

OR

Agency staff reviewed the quality management activities that will be undertaken during the plan period and determined that updated information is required.

[Insert updated information on quality management activities that the agency will implement during the plan period.]

Section 4: Public Input

N/A

Public Hearing Requirements

Agency staff reviewed the Iowa Administrative Rule, 17-6.2 (231) on public hearing requirements and determined that the updated information provided does not necessitate a public hearing. (No additional information is required.)

OR

Agency staff reviewed the Iowa Administrative Rule, 17-6.2 (231) on public hearing requirements and determined that the updated information provided required a public hearing. Public hearing documentation appears below.

Governing Body

Governing Body for: The Heritage Area Agency on Aging

Updated On: 2/19/2018

Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires
Renee Riffey	803 Dorchester Place NE	Cedar Rapids 52402	Linn	319-389-2181 Renee@ageucate.com	To be established through bylaw development

Vice Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires
N/A	N/A	N/A	N/A	N/A	N/A

Secretary/Secretary-Treasurer

Name	Address	City & Zip	County	Phone & Email	Term Expires
Peg Sprengeler	PO Box 288	Walford 52351	N/A	319-721-5504 Peg.Sprengler@kirkwood.edu	N/A

Treasurer, (if separate officer)

Name	Address	City & Zip	County	Phone & Email	Term Expires
Jim Choate	11000 Feather Ridge Rd	Toddville 52341	Linn	319-551-2207 Jim.Choate@kirkwood.edu	To be established through bylaw development

Other Members

Name	Address	City & Zip	County	Phone & Email	Term Expires
Rose Rennekamp	2312 Deer Run NE	North Liberty 52317	Johnson	319-626-6479 Rose.Rennekamp@gmail.com	To be established through bylaw development
Steve Ovel	138 Guildford SE	Cedar Rapids 52403	Linn	319-533-4539 sovel@aol.com	To be established through bylaw development
Danielle Pickering	202 C Avenue	Atkins 52206	Benton	319-491-4274 Daniel.Pickering@kirkwood.edu	To be established through bylaw development

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)

All composition criteria are satisfied.

Advisory Council for: The Heritage Area Agency on Aging
Updated on: 2/19/2018

Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Evans Waller	1726 Taylor Ave	Bennett 52721	Cedar	563-249-3410 elwaller39@aol.com	6/30/2018	1, 2, 5, 7

Vice Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Larry Kudej	2770 Jeremy Ct NW	Swisher 52338	Johnson	319-857-5191 ldkudej@aol.com	6/30/2018	1, 2, 5, 7

Secretary/Secretary Treasurer

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Sjonna Brunt	6301 Kirkwood Blvd SW	Cedar Rapids 52404	Linn	319-398-7633 Sjonna.Brunt@kirkwood.edu	N/A	N/A

Treasurer (if separate officer)

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
N/A	N/A	N/A	N/A	N/A	N/A	N/A

Other Members:

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Shirley Geadelmann	306 6 th Avenue	Clarence 52216	Cedar	563-452-4183 N/A	6/30/2018	1, 2, 4, 5, 7
Kice Brown	203 W Pioneer Rd	Lone Tree 52755	Johnson	319-629-5524 kice@iowatelecom.net	6/30/2018	1, 2, 4, 5, 6, 7

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Ed Dunbar	308 East Burlington Street PMB 182	Iowa City 52249	Johnson	319-541-1721 eddunbar@msn.com	6/30/2018	1, 2, 7
Robert Welsh	84 Penfro Dr	Iowa City 52246	Johnson	319-354-4618 welshbob@aol.com	6/30/2018	1, 2, 5, 7
Shawn Zierke	4124 V Street	Homestead 52236	Johnson	319-321-9287 shawn.zierke@gmail.com	6/30/2018	5,7
Lisa Tallman	112 N Ford St	Anamosa 52205	Jones	319-462-4484 jcsd@co.jones.ia.us	6/30/2018	4, 5, 7
Sandra Bell	5665 Cornell St SW	Cedar Rapids 52404	Linn	319-560-1580 sdemowiz@aol.com	6/30/2018	1, 2, 4, 5, 7
Toni Claussen	1224 13 th Street NW	Cedar Rapids 52405	Linn	319-365-9171 tonic@methwick.org	6/30/2018	3, 4, 5, 7
Judy Fries	1421 28 th Street SE	Cedar Rapids 52403	Linn	319-365-3719 judyfries1@msn.com	6/30/2018	2, 5, 7
Jake Hughes	1239 1 st Avenue SE Suite D	Cedar Rapids 52402	Linn	319-899-1226 jakehughes@synergyhomemecare.com	6/30/2018	3, 5, 7
John North	6002 Flagstone Dr NE	Cedar Rapids 52402	Linn	319-377-3104 jnorth7304@aol.com	6/30/2018	1, 2, 5, 7
Renee Riffey	803 Dorchester Place NE	Cedar Rapids 52402	Linn	319-389-2181 Renee@ageucate.com	6/30/2018	2, 5, 7
Sallie Streib	614 Green Valley Ter. SE	Cedar Rapids 52403	Linn	319-365-1020 streibe@msn.com	6/30/2018	1, 2, 7

LifeLong Links Advisory Council

LifeLong Links Advisory Council for: The Heritage Area Agency on Aging

Updated On: 02/01/2018

Name	Organization	Address	City & Zip	County	Phone & Email
John Brandt	Community Volunteer	4027 Lakeview Dr. SW	Cedar Rapids, IA 52404	Linn	319-632-1741 brandtjckm@outlook.com
Eugenia Kendall	Heritage AAA	6301 Kirkwood Blvd. SW	Cedar Rapids, IA 52404	HAAA Region	319-398-7676 eugenia.kendall@kirkwood.edu
Terry Bergen	Linn County - Mobility	625 31 st Ave SW	Cedar Rapids, IA 52404	Linn	319-892-5172 terry.bergen@linncounty.org
Jorden Cullen	HomeChoice Senior Care	1415 Blairs Ferry Rd. Ste B	Marion, IA 52302	Linn	319-363-2721 jordan@homechoiceseniorcare.com
Toni Claussen	The Meth-Wick Community	1224 13 th St. NW	Cedar Rapids, IA 52405	Linn	319-363-2402 tonic@methwick.org
Leah Donald	Access2Independence	1556 S 1 st Ave Ste B	Cedar Rapids, IA 52242	HAA Region	319-338-3870 ed@access2independence.org
Cliff Ehlinger	United Way 2-1-1	317 7 th Ave SE Ste 401	Cedar Rapids, IA 52401	HAAA Region	319-398-5372 cehlinger@uweci.org
Pat Giorgio	Evergreen Estates	2204 Johnson Ave NW	Cedar Rapids, IA 52404	Linn	319-363-8116 pay@evergreenestates.biz
Rusty Goins	Linn Co. General Assistance, Ryan White Program, Home Health	1240 26 th Ave. Ct. SW	Cedar Rapids, IA 52404	Linn	319-892-5773 rusty.goins@linncounty.org
Tom Hardecopf	Linn Co. LIFTS	625 31 st AVE SW	Cedar Rapids, IA 52404	Linn	319-892-5171 tom.hatdecopf@linncounty.org
Kathy Horan	Aging Services, Inc.	317 7 th Ave SE Ste 302	Cedar Rapids, IA 52401	Linn	319-398-3644 khoran@AbbeHealth.org
Mike Lightbody	Iowa COMPASS	Home Office	Nebraska	HAAA Region	319-353-8778 michael-lightbody@uiowa.edu
Jena Maloney	UnityPoint Health – St. Luke’s Hospital	1026 A Ave NE	Cedar Rapids, IA 52406	HAAA Region	319-369-7305 jena.maloney@unitypoint.org
Melissa Morford	Brain Injury Alliance of Iowa	1527 S Gilbert St	Iowa City, IA 52240	HAAA Region	319-466-7455 melissa@biaia.org
Dani Nelson	Abbe Center – Integrated Health Homes	317 7 th Ave SE Ste. 302A	Cedar Rapids, IA 52401	Linn	319-261-0576 dnelson@abbehealth.org
Lisa Nelson	Heritage Specialty Care	200 Clive Dr SW	Cedar Rapids, IA52404	Linn	319-396-7171 lnelson@careinitiatives.org
Brenda McAllister	Mercy Home Care	2740 1 st Ave. NE	Cedar Rapids, IA 52402	HAAA Region	319-398-6034 bmcallister@mcervycare.org

Name	Organization	Address	City & Zip	County	Phone & Email
Melissa Pence	Alzheimer's Association	317 7 th Ave	Cedar Rapids, IA 52401	HAAA Region	319-297-9699 mpence@alz.org
Lucia Herman	MHDS East Central Iowa Region	PO Box 427	Anamosa, IA 52205	HAAA Region	319-462-4457 lherman@co.jones.ia.us
Joanna Shade	Marengo Memorial Hospital	300 W May St	Marengo, IA 52301	Iowa	319-642-8063 jshade@marengohospital.org
Don Tyne	Linn County Veteran Affairs	1240 26 th Ave St. SW	Cedar Rapids, IA 52404	Linn	319-892-5162 donald.tyne@linncounty.org
Allison Walker	Goodwill of the Heartland	1441 Blairs Ferry Rd NE	Cedar Rapids, IA 52402	Linn	319-573-9246 awalker@goodwillheartland.org
Chris Wolf	Pioneer Park	501 E Pioneer Rd	Lone Tree, IA 52755	Johnson	319-629-4255 lthccadmin@lthcc.com
Kathy Olson	To The Rescue	139 40 th St NE	Cedar Rapids, IA 52402	Linn	319-826-6068 kolson@totherescue.net
Whitney Alber	The ARC of East Central Iowa	680 2 nd St. SE Suite 200	Cedar Rapids, IA 52401	Linn	319-385-0487 walber@arceci.org

ATTACHMENTS

Authorized Signatures

Area Agency on Aging Name	Primary Street Address	City & Zip	Type of Agency	Date of AAA Designation
The Heritage Area Agency on Aging	6301 Kirkwood Blvd SW	Cedar Rapids 52404	Separate organizational unit within a multipurpose agency- Kirkwood Community College	1971

Authorized Signatures for Funding Applications and Contracts

Print Name: Kellie Elliott-Kapparos; Interim Co-Director



Signature of Interim Co-Director

3/29/18

Date Signed

Print Name: Jill Sindt; Interim Co-Director



Signature of Interim Co-Director

3/29/18

Date Signed

Print Name: Renee Riffey, Chair



Signature of Chair, Governing Body

3/29/18

Date Signed

Authorized Signatures for Fiscal Reports

Print Name: Kellie Elliott-Kapparos; Interim Co-Director

Kellie Elliott Kapparos

Signature of Interim Co-Director

3/29/18

Date Signed

Print Name: Jill Sindt; Interim Co-Director

Jill Sindt

Signature of Interim Co-Director

3/29/18

Date Signed

Print Name: Renee Riffey, Chair

Renee Riffey, Chair

Signature of Chair, Governing Body

3/29/18

Date Signed

Print Name: Heidi Shaw, Fiscal Director

Heidi Shaw

Signature of Fiscal Director

3-29-18

Date Signed

Authorized Signatures for Program Reports

Print Name: Kellie Elliott-Kapparos Interim Co-Director

Kellie Elliott Kapparos

Signature of Interim Co-Director

3/29/18

Date Signed

Print Name: Jill Sindt; Interim Co-Director

Jill Sindt

Signature of Interim Co-Director

3/29/18

Date Signed

Grievance Procedures

Agency staff reviewed the grievance procedures information in the plan and determined that the information is current. (No additional information is required.)

OR

Agency staff reviewed the grievance procedures information in the plan and determined that updated information is required. Updated information appears below.

[Insert updated information on how members of the public may obtain your agency's grievance procedures related service provision.]

Nutrition Services, Service Providers, and Senior Center/Focal Points

Nutrition Services

Agency staff reviewed the following Nutrition Services information entered into SAMS and verified that the information is current as of **2/26/18**.

Nutrition Services information to be verified for accuracy includes:

- Location (Name, Street Address, City, Zip)
- Frequency

Service Providers of OAA Services

Agency staff reviewed the Service Provider information entered into SAMS and verified that the information is current as of **2/26/18**.

Senior Centers and Focal Points

Agency staff reviewed the Senior Center and Focal Point information entered into SAMS and verified that the information is current as of **2/26/18**.

Agency staff reviewed the information on the process agency uses to identify and select facilities as focal points in the agency's PSA and determined that the information is current. (No additional information is required.)

OR

Agency staff have reviewed the information on the process agency uses to identify and select facilities as focal points in the agency's PSA and determined that updated information is required. Updated information appears below.

[Insert updated information on process agency uses to identify and select facilities as focal points in the agency's PSA.]

Emergency Plan Summary

Agency staff reviewed the emergency preparedness planning and plan activation information in the plan and determined that the information is current. (No additional information is required.)

OR

Agency staff reviewed the emergency preparedness planning and plan activation information in the plan and determined that updated information is required.

[Insert updated information on the activities the agency is involved in as they relate to preparedness planning and plan activation. Insert updated information that describes how the agency collaborates with other entities, including partners and contractors, as well as emergency response agencies, relief organizations, government agencies or other institutions, when carrying out these activities.]

Direct Service Requests

The request to provide direct service(s) submitted with the SFY 2018 – 2021 Area Plan on Aging are **current**. (No additional information is required.)

OR

The agency seeks to provide additional service(s) directly in the planning and service area starting in SFY 2019. A completed Request to Provide Direct Service form has been submitted with the plan for the new direct service the agency plans to provide starting in SFY 2019.