

Questions and Answers Regarding the Area Plan Instructions

Last revised 2/16/2016

Q: These instructions look daunting, and it seems like there will be a large workload required to produce a final product. Can the SUA provide any assistance or resources that will help AAAs with this work?

A: Yes. With respect to resources, the SUA posted trainings, materials, demographic data and interactive data map, and additional data sources on the website at: <http://www.oregon.gov/DHS/SENIORS-DISABILITIES/SUA/Pages/Area-Agency-Aging.aspx>. We will continue to add training materials and other resources as they become available. Also, the 2017-2020 Area Plan Instructions document has a number of hyperlinks embedded in the narrative to websites where there is additional information and resources.

A roster of SUA staff assigned to your area who can provide technical assistance in the development of your plan is on the SUA website as well as in the instruction document attachments. Please contact your liaison for further clarification or explanation of either the instructions or development of the area plan.

The SUA will also provide information/training on other topics in the future. Information and details will be disseminated.

Q: Can you define Discretionary Funding?

A: For the purposes of this document, specifically Section A-4, discretionary funds are considered those that are available after meeting the minimum Title IIIB expenditure requirements. Discretionary funds from local sources are those funds which, if available, would be used to supplement the provision of services meeting the definition of OAA services.

Q: We use greatest economic/social need in determining how to prioritize our programs. However, as a non-profit we raise money separately, which we consider “discretionary” funds, for projects/programs that may not qualify under that concept. Can you provide some clarity about how to address these funds in the area plan?

A: One of the requirements of the OAA is that each Area Plan will provide assurances that funds received under Title III of the Act will be used to provide benefits and services to older individuals with priority given to those identified in Section 306, paragraph (4)(A)(i) (greatest economic need, greatest social need, etc.). However, some AAAs also have additional funds available which are used to supplement the provision of services meeting the definition of OAA services. Section A-4 is asking AAAs first to prioritize how Title IIIB funds will be used (after meeting the minimum expenditure requirements)

and the process you will use to further prioritize the use of these funds in the event of budget reductions or increases. Local discretionary funds refer to those which have been allocated to supplement provision of OAA services and programs. Describe how those funds might be used in the event of budgetary changes.

Q: Can you provide an example of “weighting” individual elements?

A: Thanks to the authors of the Olympic AAA Area Plan:

FUNDING GUIDELINES

1. Funds must be allocated in accordance with mandates from each funding source.
2. Services/support must be responsive to the current operating environment. Critical elements to focus on for 2008 – 2011:
 - ensuring AAA maintains the capacity and flexibility to respond to emerging local needs through AAA programs (e.g., its I & A services);
 - prevention services and health promotion programs aimed at reducing the burden of chronic disease and injury in the service population;
 - greater coordination and support for local service delivery, i.e., at the community level, at county level, and at regional levels, e.g., as within transportation and mental health regions;
 - strengthening the safety net for vulnerable adults through support for traditional (professional and family caregivers) and non-traditional stakeholders, engaging businesses and faith-based organizations in developing new services and support; and
 - engaging consumers in creating solutions, through technology and development of an integrated service model that wraps services around the consumer and reflects our diverse and rural communities.
3. AAA will consider first for funding those services/supports which are a high priority and which are not and cannot reasonably expect funding by other entities.
4. Services will be funded at a level sufficient to make the program viable and responsive to consumer needs. AAA will encourage providers to "leverage" additional funds for joint funding of services, and may assist providers to secure funds from grants and other sources.
5. AAA will generally avoid allocating funding to services in which the AAA contribution is less than 15% of the total for that particular service and it appears likely that other funding, or fundraising, could be used to cover the service cost.

6. In the case of new services and/or initiatives for which other funding sources may be anticipated, AAA funding may be allocated and considered "seed" money, for a time-limited period.
7. Consideration will be given to the needs, resources, and proportion of the target population in each county in developing funding allocations.

Q: Will you be providing a template to use in the development of the Area Plan?

A: You can use the Table of Contents in the instruction document as your guide or you can use the full instructions document, deleting the current verbiage and inserting your own.

Q: Under the Statement of Assurances is the following requirement:

"All agreements with providers of OAA services shall require the provider to specify how it intends to satisfy the service needs of low-income minority individuals and older individuals residing in rural areas and meet specific objectives established by the [AAA] for providing services to low income minority individuals and older individuals residing in rural areas within the Planning and Service Area."

Are we expected to apply this requirement to every service provider receiving OAA money? We will often have small agreements with individuals or organizations for very limited purposes, such as providing a presentation on fall prevention, or medication management, or giving instruction on Tai Chi or nutrition education. We have contracts with providers of language interpretation, who provide "on-call" types of services.

A: The Administration on Aging, Region X, recommends that this requirement be present in all contracts. This requirement will help to ensure that the content of the presentation/materials/direct service will be culturally sensitive and appropriate. Any agreements for services which have content relevant to the populations described in the above assurance should include that language. Consider a boiler plate.

An exception would be in contracts for services such as home delivered meals preparation, where the vendor is simply preparing or procuring a product.

Q: How detailed does Section B-4 - Non-AAA Services, Service Gaps and Partnerships to Ensure Availability of Services Not Provided by the AAA - need to be? Which services need to be included in this section?

A: A critical element in the mission of a AAA is to engage in activities designed to lead to the development or enhancement of comprehensive and coordinated community based systems in, or serving, each community in the planning and service area. Some services in the overall system are provided by or through the AAA via contracts (as described in

Section B-3), but there are also important services apart from those administered by a AAA. These services/programs are important in addressing the needs of the populations served and make it possible for older adults and people with disabilities to live in their communities with dignity and independence. The intent of this section is for the AAA to identify important non-AAA services and significant service gaps, not to identify every service available.

In painting a picture of the overall service network and activities taken or needed to ensure coordinated community based systems, you might describe:

- The AAA's role in any local planning efforts (i.e., housing, transportation, healthcare)
- Partnerships or lack of partnerships with other providers
- Coordination needs or priorities
- Specific services which serve your planning purposes
- How identified service needs will be addressed by partner organizations
- Service gaps and unmet needs in the overall service network

The RTZ software can be used to generate information and data relevant to this section as well. The **Needs Summary Report** summarizes needs and referrals as well as unmet consumer needs, by category of service. The **Referral Summary** and **Referral Summary Top 20 Reports** provide information on referrals made to agencies and programs, in rank order. The list of all resources in an area can also be pulled from the database and sorted by taxonomy or you can search for resources by need, taxonomy or key word in a given service area. (Note: RTZ software will provide reports only on what is *recorded* in the system. In some cases, needs, unmet needs, and referral data is only available for a small portion of calls received.)

Q: Do we have to address service equity in every area of the plan?

A: As indicated in the instructions, the goal is to consider how service equity will be addressed in each area of the AAA's programs and plans. The AAA does not need to specifically discuss service equity in each narrative or have a specific objective focused on service equity in each focus area, but it should be clear from the way programs and community engagement is planned that service equity is being considered. To assist AAAs in thinking about service equity in connection to the Area Plan, please see the "[Service Equity Strategies for AAAs](#)" document found on the SUA website, as well as resources relating to LBGT outreach and resources for serving people with disabilities.