



## SFY 2025 Area Agency on Aging Plan Update Synopsis

SFY 2022-2025 Area Plan on Aging

To: Iowa Commission on Aging – June 10, 2025



## Table of Contents

SFY 2025 Area Plan Update Review .....	2
SFY 2025 Area Plan Update Summary .....	3
Planning & Service Area 1: Elderbridge Agency on Aging.....	5
Planning & Service Area 2: Northeast Iowa Area Agency on Aging.....	6
Planning & service area 3: Aging Resource of Central Iowa.....	7
Planning & Service Area 4: Heritage Area Agency on Aging .....	8
Planning & Service Area 5: Milestones Area Agency on Aging .....	9
Planning & Service Area 6: Connections Area Agency on Aging.....	10
Consumer Projections SFY 2025 – All Services.....	11
Expenditure Projections SFY 2025 – All Services .....	12
SFY 2025 Budget Funding by Source .....	13
Attachment A: PSA Map and Contact Information.....	14
Attachment B: Iowa HHS - Division of Aging and Disabilities Services (ADS) SFY 2025 Area Plan Update Review Tool.....	16

# SFY 2025 Area Plan Update Review

## Iowa Commission on Aging Area Plan Duties

Per Iowa Code, Iowa HHS - Older Iowans Act, Chapter 231.14(1)(a), and Iowa Administrative Code (IAC) 17-6.2(8)(231), the Iowa Commission on Aging approves all new area plans and amendments to approved area plans. Six Area Agencies on Aging are operating under approved four-year Area Plans on Aging (SFY 2022 – 2025).

- Northeast Iowa Area Agency on Aging requested an area plan amendment for a change in service. This request will be considered for approval by the commission.

## About Annual Area Plan Updates

Per IAC 17-6.2(2)b.(231), AAAs must submit an annual area plan update to the Iowa HHS - Division of Aging and Disability Services (ADS) for administrative review. Updates must be completed according to the format and due date prescribed by ADS, using the procedures identified in the Area Plan Update Instructions. This summary includes an overview of the six AAA's State Fiscal Year (SFY) 2025 area plan updates.

## SFY 2025 Area Plan Update Summary

All AAAs submitted submit an SFY 2025 area plan update, per ADS's update instructions, on April 25, 2023. ADS's instructions directed the AAAs to submit an SFY 2025 area plan update that identified accomplishments, initiatives implemented, and changes that have occurred at the agency since the submission and approval of its SFY 2022 – 2025 Area Plan on Aging.

As part of their area plan updates, agencies also submitted to ADS a single fiscal year (SFY 2025) Projected Area Plan Budget for services included in their plan. An area plan budget report consists of projected expenditures for the administration of each listed service, the projected number of consumers to be served by service and the projected number of units to be provided by service. The projected consumer information also includes projected number of consumers in the target populations (N) to be served by service (N = total of 60+, 60+ minority, 60+ minority & poverty, 60+ poverty, and 60+ rural).

Together, the area plan narrative and the area plan budget report provide valuable information on planned and actual administration at the local level. The usefulness of these documents help ADS and AAA's better communicate, gauge trends, gain perspective on effectiveness, document gaps and share programmatic successes in serving older lowans, adults living with disabilities, veterans, and caregivers.

Refer to Attachment A for Area Agency on Aging Planning and Service Area (PSA) map and contact information.

### ADS's SFY2025 Area Plan Update Review

ADS staff considered the following items in its review and evaluation:

1. *Required Information.* The SFY 2025 Update to the 2022-2025 Area Plan on Aging Instructions specified required items that AAAs must include in the plan update. These items were also listed in the ADS review tool shared with the AAAs in the SFY 2025 Area Plan Update Materials Google Drive folder.
2. *Plan Quality and Comprehensiveness.* The SFY 2025 Update instructions specified elements that AAAs must address in their plan update. ADS's review tool shared with the AAAs included the questions that ADS staff utilize to evaluate the area plan update and the annual area plan budget report.

The SFY 2025 Area Plan Update Evaluation document (refer to Attachment B: ADS SFY 2025 Area Plan Update Evaluation Tool) includes the following information.

- Area Plan Strengths / Items of Interest. This section includes strengths of the plan and items of interest to the ADS reviewers. No action is required on these items. Items noted here will be shared with the Iowa Commission on Aging.

- Conditions Requiring Corrections, Revisions, or Clarification. This section is organized according to the outline of the area plan update. Requests for clarifications, corrections, and revisions are noted with “**Action Required**” and an explanation.
- Technical Assistance Topics. This section lists areas of concern that may require future technical assistance from ADS. No action is required on these items. The additional feedback information will be shared with the Commission.

**All AAAs provided information as requested and within the specified time frame.**

Over all, information received, varied in detail and content. ADS works collaboratively with the AAAs to ensure that the SFY 2025 area plan updates provide useful information on successes, initiatives, and needs of the lowans they serve in their planning and service area.

## Planning & Service Area 1: Elderbridge Agency on Aging

**Counties Served:** Audubon, Buena Vista, Calhoun, Carroll, Cerro Gordo, Clay, Crawford, Dickinson, Emmet, Floyd, Franklin, Greene, Guthrie, Hamilton, Hancock, Humboldt, Kossuth, Lyon, Mitchell, O'Brien, Osceola, Palo Alto, Pocahontas, Sac, Sioux, Webster, Winnebago, Worth, and Wright

**Director:** Shelly Sindt

**Items of Note:** Elderbridge provided a summary of activities completed to-date as well as activities planned for SFY 2025. ADS noted an interest in the following activities and accomplishments highlighted in the update:

- Experienced an 83% increase in the number of consumers enrolled in their Options Counseling program due to steady referral flow into the Iowa Return to Community program.
- Development of the Clear Pathways Program as a part of their Elder Justice Grant that offers a team approach to client directed plan to intervene and prevent further abuse and neglect.
- Has plans to translate agency specific brochures into other languages and has also gained a Hispanic volunteer to provide outreach to Hispanic communities.
- Development of a priority needs assessment for the waiting list process.

**Direct Service Request:** Elderbridge affirmed all approved direct service waivers remain current and did not request direct service waivers for additional services.

**Request for Fund Transfer:** Elderbridge did not request fund transfers for SFY 2025.

## Planning & Service Area 2: Northeast Iowa Area Agency on Aging

**Counties Served:** Allamakee, Black Hawk, Bremer, Buchanan, Butler, Chickasaw, Clayton, Delaware, Dubuque, Fayette, Grundy, Hardin, Howard, Jackson, Marshall, Poweshiek, Tama, and Winneshiek

**Director:** Mike Donohue

**Items of Note:** NEI3A provided a summary of the agency's accomplishments and challenges. The update reflected a sincere focus on responding to community needs in FY2025. Accomplishments highlighted in the update include:

- Changed home delivered meal operating model to focus on drop shipped refrigerated meals which enabled them to serve all consumers on the waitlist in January 2025.
- Established a hospital referral partnership through Iowa Return to Community program that increased awareness of NEI3A services within the hospital and health systems.
- Established prioritization tools for services where consumer needs exceed capacity to fund and service them.
- Awarded a grant from the National Council on Aging to become a "Benefits Enrollment Center".

**Direct Service Request:** NEI3A affirmed all approved direct service waivers remain current and did not request direct service waivers for additional services.

**Request for Fund Transfer:** NEI3A did not request fund transfers for SFY 2025.

**Area Plan Amendment:** NEI3A requested an amendment to their approved area plan on aging. The amendment reflects a reduction in the services that will be offered. The following services will be discontinued in SFY 2025 for all counties in NEI3A's Planning and Service Area (PSA) due to lack of funding.

1. Chore Services
2. 60+ Emergency Response System
3. FC Emergency Response System

A public hearing on these services changes was held on 5/10/24.

Action Needed: We are seeking a motion to approve NEI3A' area plan amendment for state fiscal year 2025.

## Planning & service area 3: Aging Resource of Central Iowa

**Counties Served:** Boone, Dallas, Jasper, Madison, Marion, Polk, Story, and Warren

**Director:** Joel Olah

**Items of Note:** Aging Resources provided a summary of activities completed to date and activities planned for SFY 2025. ADS noted an interest in the following activities and accomplishments highlighted in the update:

- Expanded evidence-based health promotion to include Tai Chi for Arthritis, A Matter of Balance, and Bingocize to offer a variety for consumers.
- Offering a variety of evidence-based programming has also increase congregate meal consumers.
- The addition of two rural options counselors to target low-income consumers and those at-risk of institutionalization increased enrollment into their Options Counseling program.
- Increased involvement in Multi-Disciplinary Teams meetings and local coalitions has resulted serving more consumers in their EAPA program.
- Increased the agency's Medicaid Administrative Claiming reimbursement rate which has resulted in additional funding for the agency.

**Direct Service Request:** Aging Resources affirmed all approved direct service waivers remain current and did not request direct service waivers for additional services.

**Request for Fund Transfer:** Aging Resources requested the following fund transfer for SFY 2025:

- \$300,000 from IIIC(1) Congregate Meal to IIIC(2) Home-Delivered Meals.



## Planning & Service Area 4: Heritage Area Agency on Aging

**Counties Served:** Benton, Cedar, Iowa, Johnson, Jones, Linn, and Washington

**Directors:** Barb Werning

**Items of Note:** Heritage's plan provided a summary of agency services, partnerships, and priorities for the plan period. ADS noted an interest in the following activities and accomplishments highlighted in the plan:

- Development of Heritage care team to deliver onsite, one-stop shop services within the Wellington Heights neighborhood to meet the needs of people where they are.
- IRTC partnership with Mercy Medical Center has increased referrals and consumer enrollment.
- Encore Essentials (mobile food pantry) successfully transitioned to providing a protein and produce distribution serving and has expanded to serve their entire seven county region.
- Added a PrepWise AmeriCorps Volunteer to offer consumers help with emergency planning.

**Direct Service Request:** Heritage affirmed all approved direct service waivers remain current and did not request direct service waivers for additional services.

**Request for Fund Transfer:** Heritage requested the following fund transfers for SFY 2025:

- \$101,025 from IIIB Supportive Services to IIIC(2) Home-Delivered Meals.
- \$181,938 from IIIC(1) Congregate Meals to IIIC(2) Home-Delivered Meals.

## Planning & Service Area 5: Milestones Area Agency on Aging

**Counties Served:** Appanoose, Clinton, Davis, Des Moines, Henry, Jefferson, Keokuk, Lee, Louisa, Lucas, Mahaska, Monroe, Muscatine, Scott, Van Buren, Wapello, and Wayne

**Director:** Becky Passman

**Items of Note:** Milestones provided a summary on activities completed and barriers addressed. ADS noted an interest in the following activities and accomplishments highlighted in the update:

- Evidence-based programming is experiencing a steady growth in consumers served.
- A home risk assessment protocol and the cultivation of partnerships and resources to support home modifications and repair services was developed in response to consumer needs.
- Collaboration with homeless coalition to expand homeless referral and assistance has increased the number of persons served with rent deposits and utility bills.
- Developed a prioritization process to ensure nutrition services are targeted to those with greatest economic or social need, or at risk of institutionalization.
- Partnership with the Diversity Center Services which provides culturally specific meals has increased the number of diverse consumers served with congregate meals.

**Direct Service Request:** Milestones affirmed all approved direct service waivers remain current and did not request direct service waivers for additional services.

**Request for Fund Transfer:** Milestones did not request fund transfers for SFY 2025.

## Planning & Service Area 6: Connections Area Agency on Aging

**Counties Served:** Adair, Adams, Cass, Cherokee, Clarke, Decatur, Fremont, Harrison, ADS, Mills, Monona, Montgomery, Page, Plymouth, Pottawattamie, Ringgold, Shelby, Taylor, Union, and Woodbury

**Director:** Kelly Butts-Elston

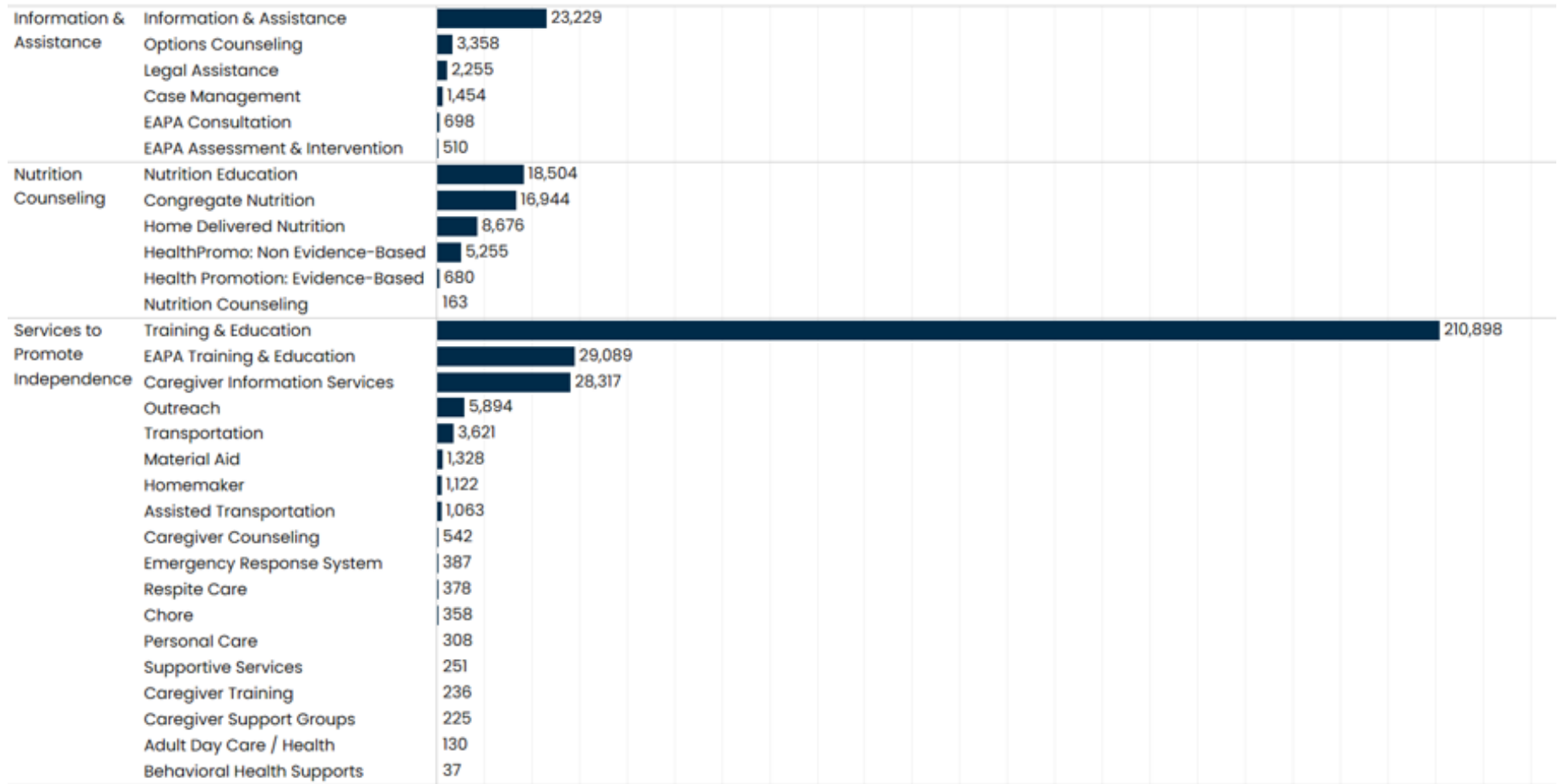
**Items of Note:** Connections provided a summary on activities completed and barriers addressed. ADS noted an interest in the following activities and accomplishments highlighted in the update:

- With workforce shortages of local service providers, Connections developed a Rapid Response program to ensure that consumers would receive needed in-home services.
- Connections continues to have a thriving Iowa Café meal program and partners with 14 different restaurants. They recently added an ethnic restaurant partners and are preparing to add HyVee as a café partner in Council Bluffs soon.
- Received an Aging and Disability Vaccine Collaborative Grant from ACL through USAging and has established a partnership with Hy-Vee Pharmacy and Public Health to administer vaccines.

**Direct Service Request:** Connections affirmed all approved direct service waivers remain current and did not request direct service waivers for additional services.

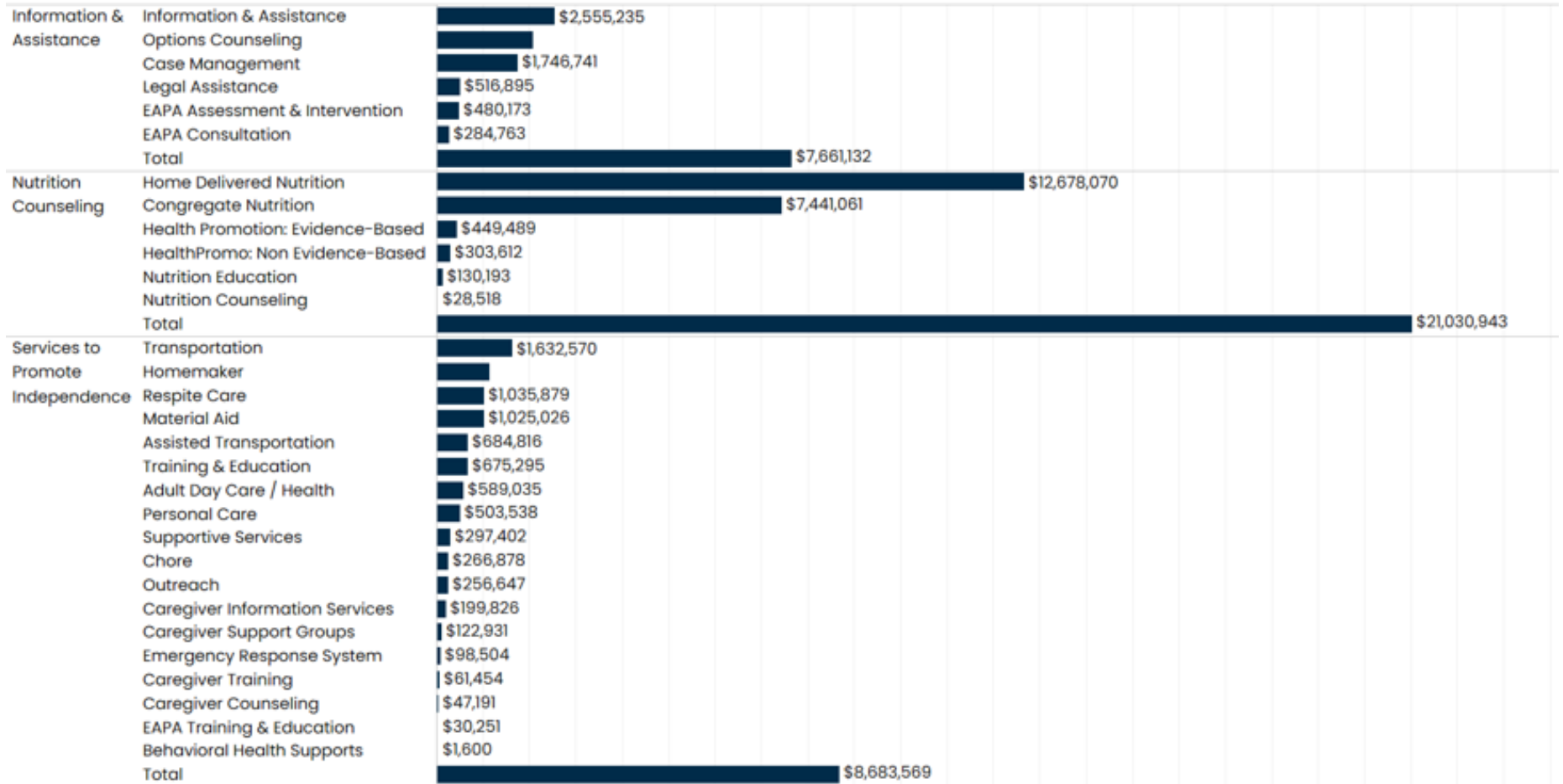
**Request for Fund Transfer:** Connections did not request fund transfers for SFY 2025.

## Consumer Projections SFY 2025 – All Services



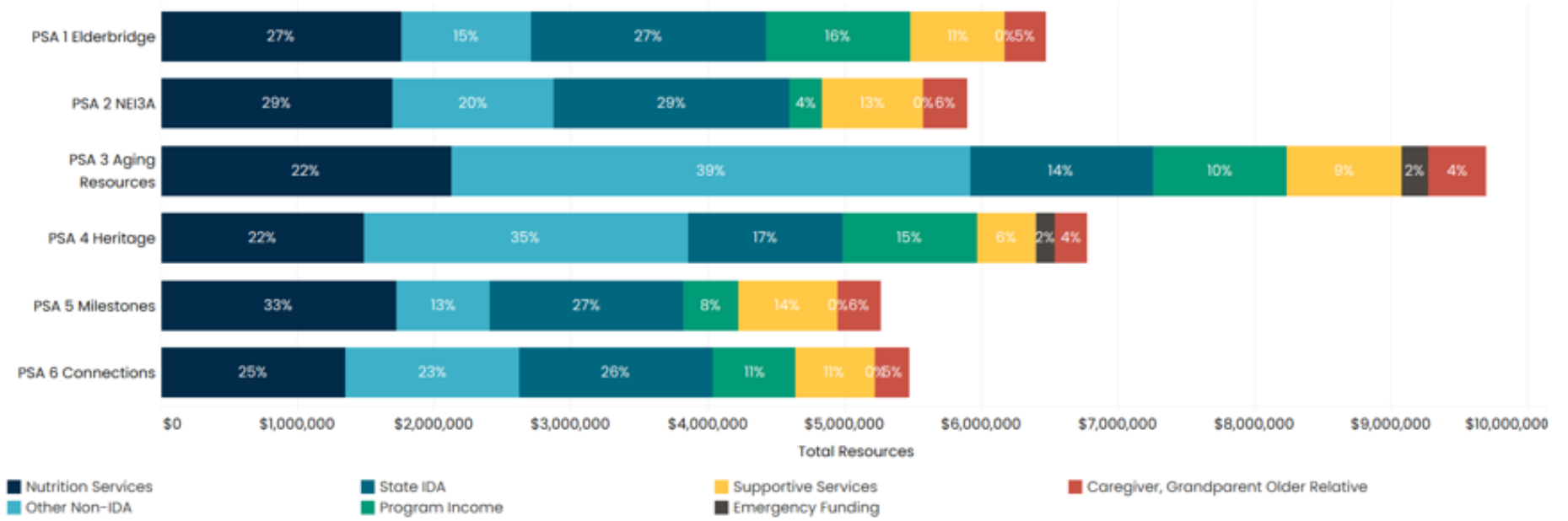
Sum of Proj Cons for each Service Name broken down by Service Type. The marks are labeled by sum of Proj Cons.

## Expenditure Projections SFY 2025 – All Services

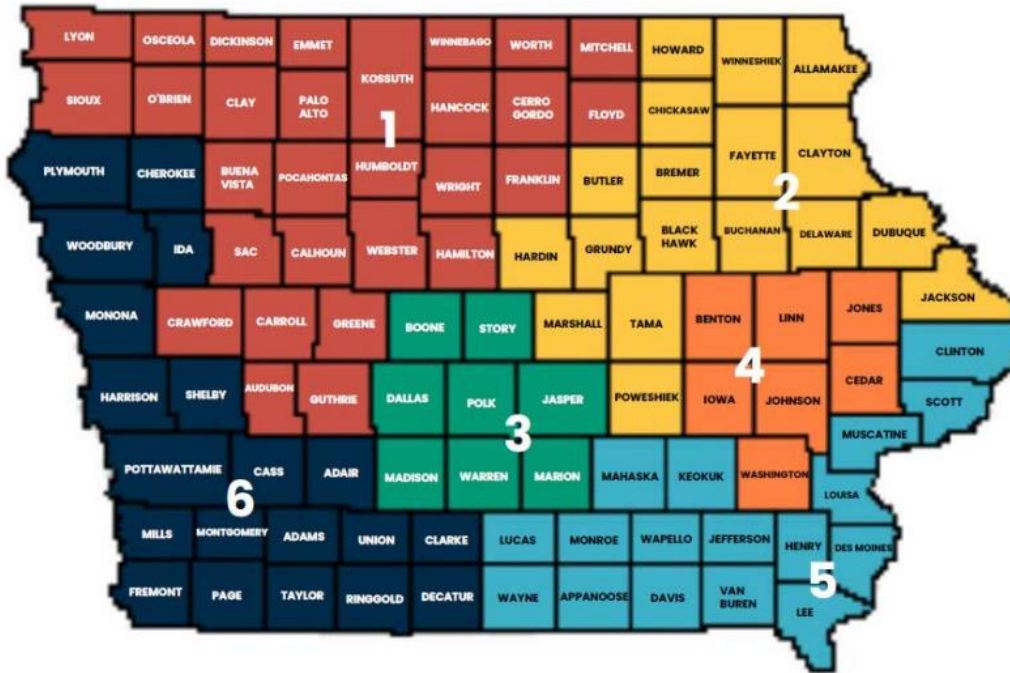


Sum of Budg Amount for each Service Name broken down by Service Type. The marks are labeled by sum of Budg Amount.

## SFY 2025 Budget Funding by Source



## Attachment A: PSA Map and Contact Information



### Planning & Service Area 1: Elderbridge Agency on Aging

**Counties Served:** Audubon, Buena Vista, Calhoun, Carroll, Cerro Gordo, Clay, Crawford, Dickinson, Emmet, Floyd, Franklin, Greene, Guthrie, Hamilton, Hancock, Humboldt, Kossuth, Lyon, Mitchell, O'Brien, Osceola, Palo Alto, Pocahontas, Sac, Sioux, Webster, Winneshiek, Worth, and Wright.

**Director:** Shelly Sindt

**Contact Information:** 1-800-243-0678

**Website:** [www.elderbridge.org](http://www.elderbridge.org)

**Locations:**

- Mason City Office: 1190 Briarstone Dr. #Ste. 3, Mason City, IA 50401
- Carroll Office: 603 N West St., Carroll, IA 51404
- Fort Dodge Office: 308 Central Ave, Fort Dodge, IA 50501
- Spencer Office: 714 10<sup>th</sup> Ave. E, Ste. 12, Spencer, IA 51301

### Planning & Service Area 2: Northeast Iowa Area Agency on Aging (NEI3A)

**Counties Served:** Allamakee, Black Hawk, Bremer, Buchanan, Butler, Chickasaw, Clayton, Delaware, Dubuque, Fayette, Grundy, Hardin, Howard, Jackson, Marshall, Poweshiek, Tama, and Winneshiek.

**Director:** Mike Donohue

**Contact Information:** 1-800-779-8707

**Website:** [www.nei3a.org](http://www.nei3a.org)

**Locations:**

- Waterloo Office: 3840 W. 9<sup>th</sup> St., Waterloo, IA 50702
- Dubuque Office: 2728 Asbury Road, Dubuque, IA 52001
- Decorah Office: 607 Washington Street, Decorah, IA 52101

### Planning & Service Area 3: Aging Resources of Central Iowa

**Counties Served:** Boone, Dallas, Jasper, Madison, Marion, Polk, Story, and Warren

**Director:** Joel Olah

**Contact Information:** 1-800-747-5352

**Website:** <https://www.agingresources.com/>

**Location:**

- Des Moines Office: 5835 Grand Ave., Ste. 106, Des Moines, IA 50312

### Planning & Service Area 4: Heritage Area Agency on Aging

**Counties Served:** Benton, Cedar, Iowa, Johnson, Jones, Linn, and Washington

**Directors:** Barb Werning

**Contact Information:** 1-800-332-5934

**Website:** <https://www.heritageaaa.org/>

**Location:**

- Cedar Rapids Office: 6301 Kirkwood Blvd. SW, Cedar Rapids, IA 52404

### Planning & Service Area 5: Milestones Area Agency on Aging

**Counties Served:** Appanoose, Clinton, Davis, Des Moines, Henry, Jefferson, Keokuk, Lee, Louisa, Lucas, Mahaska, Monroe, Muscatine, Scott, Van Buren, Wapello, and Wayne

**Director:** Becky Passman

**Contact Information:** 1-855-410-6222

**Website:** <https://www.milestonesaaa.org/>

**Locations:**

- Davenport Office: 935 E 53<sup>rd</sup> St., Davenport, IA 52807
- Ottumwa Office: 623 Pennsylvania Ave., Ottumwa, IA 52501
- Burlington Office: 509 Jefferson St., Burlington, IA 52601

### Planning & Service Area 6: Connections Area Agency on Aging

**Counties Served:** Adair, Adams, Cass, Cherokee, Clarke, Decatur, Fremont, Harrison, ADS, Mills, Monona, Montgomery, Page, Plymouth, Pottawattamie, Ringgold, Shelby, Taylor, Union, and Woodbury

**Director:** Kelly Butts-Elston

**Contact Information:** 1-800-432-9209

**Website:** <https://www.connectionsaaa.org/>

**Locations:**

- Council Bluffs Office: 231 S. Main Street, Council Bluffs, IA 51503
- Creston Office: 109 N Elm, St., Creston, IA 50801
- Sioux City Office: 2301 Pierce St. Sioux City, IA 51104



# Attachment B: Iowa HHS - Division of Aging and Disabilities Services (ADS) SFY 2025 Area Plan Update Review Tool

OAA Sec.305(a)(1)(c) and 307(a)(1); Iowa Code 231.23(2); IAC 17-2.3 and 6.2(2) In accordance with the federal Older Americans Act, Sections 305(a)(1)(c) and 307(a)(1), Iowa Code 231.23(2), and Iowa Administrative Code (IAC) 17-2.3, the Iowa HHS – Division of Aging and Disability Services evaluated the SFY 2025 Area Plan Update to the SFY 2022-2025 Area Plan on Aging utilizing the following review and evaluation tool.

## Area Plan Updated Evaluation (Comprehensive & Coordinated Delivery System)

**OAA Sect. 306(a)(1); Iowa Code 231.33(1);(2);(5);(17)**

Use these questions to evaluate whether the agency is implementing strategies and making progress toward area plan priorities. The area plan must reflect a coordinated service delivery system, be comprehensive enough to guide agency activity during the four-year period, and include effective strategies and measures to evaluate performance in serving older Iowans and Iowans with disabilities.

<b>Missing or Incomplete</b>
Was the plan missing information or incomplete with submitted information?

<b>Plan Clarity</b>
Was the plan edited for clarity and readability?

## Update Summary

The SFY 2025 Update to the SFY 2022-2025 Area Plan on Aging Instructions specified elements that AAAs must address in their plan update. ADS’s review tool shared with the AAAs included the questions that ADS staff would utilize to evaluate the plan update. ADS staff reviewed the update narrative and the area plan budget report.

<b>Update Summary</b>
Does the update summary provide an overview of accomplishments, initiatives, or changes that have occurred at the agency since the submission and approval of its SFY 2022 - 2025 Area Plan on Aging?

## Section 1: Update on Strategies to Achieve 2022 - 2025 Goals

ADS Staff Instructions:

Provide feedback regarding the Area Plan’s Quality and Comprehensiveness using the above question(s) and record your comments and recommendations within the table below. Staff feedback will then be summarized and shared within the AAA.

<b>SFY 2025 Indicator and Strategy Results</b>
Did agency explain the results their agency has achieve over the past three year of addressing each identified service gap? Did agency use percentage and numbers compiled from indicators and compare 2022 data to what the agency has achieved to date? Did agency include any remaining efforts planned for SFY 2025?
<b>SFY 2025 Lessons Learned</b>
Did agency provide a summary of lessons learned in addressing each service gaps? Did the agency reach their target population as planned? Did agency give examples of unexpected challenges or barriers they faced in reaching and/or serving the target population? Did agency explain what they plan to do differently moving forward?
<b>SFY 2025 Outcome Measures</b>
Did agency provide complete information regarding all measures and targets? Do the targets appear to be reasonable given past achievement?

<b>Public Health Emergency / ARPA Funding</b>
Does the agency provide a comprehensive plan for using the funding?
Did the agency provide information as requested?

**Section 2: Service Projections and Funding Alignment**

Compare service and funding projections for all services across agencies. Service exclusions and variations in service projections may exist for good reason; this comparison informs ADS staff on service availability.

<b>SFY 2025 Projected Older Americans Act Consumers and Service Units</b>
Is the estimated number of individuals to be served realistic/adequate?
Is the estimated number of units to be provided realistic/adequate?
<b>SFY 2025 Funding Alignment</b>
Does the amount of funding allocated to each service area appear to be an appropriate amount given the proposed SFY 2025 strategies?
Does the amount of funding for each service area appear to align with the projected consumers served and units of service delivered?
Does the agency project to spend the minimum requirement on the services listed below?

**Section 3: Quality Management**

Quality management of service programs encompass three functions: data collection which assesses ongoing program implementation, remediation of problem areas, and evidence of continuous improvement.

Did agency indicate changes to quality management activities?
If yes, was updated information provided?

## Section 4: Public Input

Did the agency provide current governing board and advisory council membership information, including composition criteria satisfied?
---

Was documentation of public input provided as stated previously under REQUIREMENTS?
---

## Attachments

Attachments were reviewed for clarity and completeness.

- Authorized Signatures
- Grievance Procedures
- Staffing and Volunteer Information
- Nutrition Services, Service Providers, and Senior Center / Focal Points
- Emergency Plan Summary
- Waiting List Information
- Direct Service Waivers
- Verification of Agency Intent and Compliance

## Final Recommendations

- Area Plan Strengths / Items of Interest
- Information Requiring Corrections and Clarifications
- Recommendations for Technical Assistance