

SFY 2025 Area Plane Update – IDA 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 Health and Human Services Division of Aging and Disability Services (ADS) will evaluate the SFY 2025 Update to the SFY2022-2025 Area Plan on Aging utilizing this review and evaluation tool.

REQUIRED INFORMATION

If an item is marked “No”, the omission will be noted and, where appropriate, IDA will direct the agency to provide the required information by a specified date.

Item	Yes/No
Area Plan Amendment Needed? IAC 17-6.2(6)	
Area Plan Budget IAC 17-6.2(5)b	
Submitted electronically on time? IAC 17-5.9(1) and (2)c; IAC 6.2(2)(b); IAC 17-6.2(5)(b)	
IDA received signed budget cover sheet on time? IAC 17-5.9(1) and (2)c	
Transfers (list and compare to previous years):	
Area Plan Update Narrative	
Submitted on time? IAC 17-5.9(1) and (2)c; IAC 6.2(2)(b)	
Electronically? IAC 17-5.9(1) and (2)c; IAC 6.2(2)(b)	
In accessible format? IAC 17-5.9(1) and (2)b; IAC 6.2(2)(b);	
Followed template, formatting, and edited for clarity? IAC 17-5.9(1) and (2)b; IAC 6.2(2)(b);	
Projected consumers and units provided in plan (Performance and Service Projections section)? IAC 6.2(5)(c)	
Verification of Agency Intent and Compliance: digital signatures must be provided. Iowa Code 231.32(4)	
Authorized signatures provided?	

Item	Yes/No
Direct Service Waivers	
Were any new Requests for Direct Service made? IAC 17-6.12(1)	
If yes, Public Hearing for new direct service requests? IAC 17- 6.2(7)	
If yes, was appropriate form submitted?	
For which services are direct service waivers requested? IAC 17-6.12(1)	
Are reasons identified valid? IAC 17- 6.12(2)	
Signed by Executive Director? IAC 17-5.9(1) and (2)b; IAC 6.2(2)(b)	
Governing Body Iowa Code 231.33(19); IAC 17—6.7(231)	
Was the Governing Board membership information updated?	
Is Board membership representative of the geographic PSA? IAC 17-6.7(2)	
Did the Board Chair sign the verification of agency intent and compliance & authorized signature documents?	
Advisory Council Iowa Code 231.33(6); IAC 17-6.8 (231)	
Was the Advisory Council membership information updated?	
Did agency indicate whether all composition criteria are met? IAC 17 6.8(1)	
Did Advisory Council Chair sign the verification of agency intent and compliance? IAC 17-6.2(7)(b)(2)	
Grievance procedure information updated? IAC 17-6.10(5)	
If yes, new information provided?	
Provider Information	
Did agency assure that provider information is up to date in WELLSKY?	
Did agency update how a focal point is identified in the PSA? Iowa Code 231.33(10)	
If yes, new information provided?	

Item	Yes/No
Emergency preparedness plan Iowa Code 231.33(18); IAC 6.9(231)	
Emergency preparedness plan update needed?	
If yes, did agency summarize activities as they relate to emergency preparedness planning and plan activation?	
If yes, did agency describe collaboration 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?	
Agency Cost Allocation Plan	
Did agency submit its Cost Allocation Plan for SFY2025?	

AREA PLAN UPDATE 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.

Item	Yes/No
Plan Clarity	
Was the plan edited for clarity and readability?	

UPDATE SUMMARY

The Update Summary should provide an overview of accomplishments, initiatives or changes that have occurred at the agency since submission and approval of its SFY 2022-2025 Area Plan on Aging. The Update Summary should also preview activities, initiatives or events planned for SFY 2025.

Item	Yes/No
Update Summary on Progress to Date	
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? <ul style="list-style-type: none"> • Progress to Date • Changes related to service delivery, staffing, and/or priorities that impact the implementation of the area plan (if any). • Accomplishments/Results to Date. • New, Unexpected Challenges. • Rationale for modifications to service gaps (if any). 	

Planned for SFY2025	
Does the summary preview activities, initiatives, or events planned for the upcoming FY?	
Did agency briefly describe major initiatives, activities, or events planned to address identified service gap/s	
Did agency provide other information pertinent to educate stakeholders on activities or issues impacting service delivery, the plan, agency, or PSA customers?	

SECTION I: STRATEGIES TO ACHIEVE 2022-2025 GOALS

The Update on Strategies must provide for each goal, information on prioritized service gaps and evidence reporting implementation of progress and strategies. Significant changes in prioritized service gaps to the approved SFY 2022-2025 Area Plan on Aging, may warrant a plan amendment.

Item	Yes/No
Indicator and Strategy Results	
Indicator data is used to explain results achieve over the past three years of addressing service gap.	
Agency compares 2022 data to what has been achieve to date.	
Agency includes a description of remaining efforts planned for SFY 2025.	
Lessons Learned	
Agency provides a summary of lessons learned in addressing service gap.	
Agency reached their target population as planned.	
Agency includes examples of what they plan to do differently moving forward.	
Outcome Measures	
All information has been completed within the Outcome Measures table.	

Public Health Emergency/ARPA Funding

Item	Yes/No
Agency checked the appropriate box to indicate status of spending down ARPA funding.	
Agency explains who they were able to reach with ARAP funding.	
Examples of how services were able to be expanded are given.	
Examples of unexpected challenges or barriers faces in reaching and/or serving target populations are described.	
Agency explains what they plan to do differently moving forward.	

SECTION 2: SERVICE PROJECTIONS

Service and Funding Projections

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 IDA staff on service availability.

Item	Yes/No
Funding Alignment	
Are services offered that are otherwise not offered statewide?	
Which services have a wide projections gap among agencies?	
Do service and funding projections align with priorities and strategies?	
Projected Older Americans Act Consumers and Service Units	
Is the estimated number of individuals to be served realistic/adequate?	
Do service projections to members of the target population(s) appear realistic/adequate?	
How do consumer projections compare with past consumer projections and with actual consumers served?	
Is the estimated number of units to be provided realistic/adequate?	
How do unit projections compare with past unit projections and with actual units provided?	
Does projected funding appear adequate to serve projected number of individuals/units?	
How does funding projections compare with past projections and with actual expenditures?	
Compare mandatory service and funding projections. Do the service and funding projections for mandatory services indicate a consumer will have consistent access to the services across the state?	
Service Delivery Information	
Did agency indicate whether it uses a self-direction service delivery approach to providing services to older adults and/or caregivers?	
Did agency indicate whether it uses a voucher method for caregivers to obtain respite services?	
If agency does use vouchers, was requested information provided?	
Service Coverage & Wait List Information	
If coverage issues exist, did agency provide a plan to cover mandatory services (i.e., home delivered meal)?	
Did agency indicate whether it has a waiting list for area plan services?	
If a wait list is used, did agency provide requested waiting list information?	
If a wait list is used, did agency adequately describe how members of the public may obtain agency's wait list policy?	

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.

Item	Yes/No
Did agency indicate changes to quality management activities?	
If yes, was updated information provided?	

Section 4: Public Input

Item	Yes/No
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?	
Public hearing needed? IAC 17-6.2(7)(a)	
If YES:	
Did agency provide a text copy of the public hearing notice & a list of groups to whom the notice was sent and dates? IAC 17-6.2(7)(a)(2)	
Was the hearing notice distributed to known groups of older individuals, PSA public officials and other interested parties?	
Did the notice include the time, date, and location of the public hearing?	
Was the notice given 14 business days prior to hearing?	
Did agency provide a copy of the agenda that includes the date, time, and location of the hearing?	
Did agenda include a distinct agenda item for priority services? IAC 17-6.2(7)(a)	
If the agency is requesting to provide direct services, did agenda include a distinct agenda item to consider direct services requests? IAC 17-6.2(7)(a)	
Did agency provide a list of people present at the hearing?	
Did agency provide a written summary of the public hearing, including comments specific to the services proposed for direct service provision? IAC 17-6.2(7)(a)(3)	
Is there any indication the hearing location would not have been fully accessible? IAC 6.2(7)(1)	

ATTACHMENTS

Authorized Signatures

Item	Yes/No
Did the agency provide information about approved signatories for agency reports??	

Grievance Procedures

Item	Yes/No
Did agency indicate that it updated the information on how members of the public may obtain the grievance procedures related service provision?	
If yes, does the updated process appear adequate / accessible to the public?	

Staffing and Volunteer Information

Item	Yes/No
Did agency provide the <i>anticipated</i> number of full and part-time positions at the agency, SCSEP beneficiaries employed at the agency, and volunteers supporting the agency for SFY 2025?	

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

Item	Yes/No
Did agency assure that nutrition service information is up to date in WELLSKY? <ul style="list-style-type: none"> Any questions or issues with nutrition service information? 	
Did agency assure that provider information is up to date in WELLSKY? <ul style="list-style-type: none"> Any questions or issues with service contract providers identified? Compare WELLSKY provider list with services in service coverage by county. Compare with direct service waiver request, was contractor listed for service not provided directly? 	
Did agency assure that senior center / focal point information is up to date in WELLSKY?	
Did agency provide information on how a focal point is identified in the PSA?	

Emergency Plan Summary

Item	Yes/No
Did agency provide their emergency preparedness information in plan?	
If yes, is emergency planning, plan activation, and collaboration information appear to be thorough enough to inform a useful emergency plan?	

Evidence-Based Programing (EBP)

Item	Yes/No
Did agency provide a list of names, locations and methods of services delivery for all evidence-based programming it intends to offer in SFY 2024?	

Waiting List Information

Item	Yes/No
Did agency provide information regarding anticipated wait list for any services in SFY 2025?	

Direct Service Waivers

Item	Yes/No
Did agency have any direct service waivers?	
If yes, has the proper procedure been followed?	

Verification of Agency Intent and Compliance

Item	Yes/No
Has the Verification of Agency Intent and Compliance document been signed and submitted?	

FINAL RECOMMENDATIONS

Area Plan Strengths / Items of Interest

Item	Yes/No
List innovative strategies, best practices, or other noteworthy items.	

Information Requiring Corrections or Clarifications

Item	Yes/No
List missing required information, corrections, or revisions that must be addressed in order for agency to approve.	

Technical Assistance

Item	Yes/No
List potential technical assistance issues or topics.	