

AREA II AGENCY ON AGING'S

AGING PLAN

For The Period

OCTOBER 1, 2015 through SEPTEMBER 30, 2019

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AREA II AGENCY ON AGING

AREA PLAN

SECTION A

**VERIFICATION of INTENT
and
SUBMITTAL**

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SECTION B

NARRATIVE

SECTION B - 1 EXECUTIVE SUMMARY OF THE AREA PLAN

The information contained in the Area Plan was compiled through discussions, public hearings/listening sessions, meetings with centers, county council on aging boards & tribal entities as well as through written feedback of stakeholders in our 11 county Planning and Service Area (PSA) in South Central Montana. The information obtained provides an accurate snapshot of the issues faced by specific individual communities, service providers and individuals throughout our PSA as they relate to delivery of needed services.

Our area encompasses a huge geographical portion of the state of Montana. There is a mixture of an urban area as well as very rural or frontier population distribution. More than 212,000 individuals reside in our service area with 73% of those individuals residing in Yellowstone County (including the city of Billings). The remaining population is widely dispersed throughout the remainder of the PSA. This alone presents huge challenges in service delivery.

Goals & Objectives were established to identify direction of our service delivery to best meet needs and to identify objectives and strategies to accomplish established goals.

Our agency plans to continue to be a leader in providing client-centered services that are not only core programs included in the Older Americans Act, but also address other needs in our service area. These services include; Home & Community Based Services, Self-Directed Personal Assistance Services, Guardianship Services, Payee Services & Veterans Directed Home & Community Based Services.

As a Contractor with the State Unit on Aging we comply with state and federal program & reporting requirements and our subcontractors who we feel are our partners in area-wide service delivery have that same responsibility.

SECTION B - 2 CONTEXT OF THE AREA PLAN

B - 2 – 1 Summary of Needs Assessment and Findings

Funding - The number one concern continues to be funding and retention for all services and programs. This includes Core programs of Congregate & Home Delivered Meals; Transportation; Ombudsman Services; ADRC; Information & Assistance; Senior Health Insurance and Legal Services Programs. This comes as no surprise as funding over the last number of years has declined or remained flat. This has resulted in service partners within our area having to make hard choices about the level of service they can offer. There has been an increase in fundraising activities on the local level as well as requests to the state Legislature to obtain funding to maintain existing services. These challenges not only interfere with any real possibility to expand programs, but provide great challenges with maintaining the current level of services being provided. There is great concern and anxiety over the fact that our elderly population continues to increase, but our funding is not following that trend.

Location - The very frontier nature of services in our area creates huge issues. In our PSA much of our population is centered in the more rural/urban area of Yellowstone County which includes the city of Billings, MT. The Area as a whole includes over 25,000 square miles and is roughly the size of the state of West Virginia. There are many individuals spread out through the farming/ranching community and living in or near communities with very sparsely populated areas with little or no community services available. Often there are no individuals available to provide caregiving activities. Individuals residing in our most rural locations have had to make the choice to move to a more populated location to receive services such as assisted living as it is not offered in their home communities. The increase in the number of assisted living facilities in our largest city of Billings has been a strain to Ombudsman services while at the same time, taking individuals away from smaller communities. The value of our ADRC's to provide single points of contact for all service needs is extremely important in an area as spread

out as much as ours. Our Counselors and staff are aware of what is available and have the ability to assist with problem resolution for individuals throughout our area.

Participation – There has been a challenge with participation and attracting new members to participate in Senior Center activities. Many of the younger members of the community continue in the work force and are not as inclined to participate in congregate settings. It is more difficult to gain volunteers from the community and centers to serve on center boards and committees. This raises the concern of how to sustain and build programs to continue our mission and prepare for increased needs as our elder population continues to expand.

Transportation – Given our frontier location, transportation continues to be a major issue. The programs with the ability to provide a transportation program are sparsely located throughout our planning and service area. The needs of the individuals in our area also vary greatly. Many have available transportation or individuals that can transport them for their needs, but the most isolated and vulnerable individuals often do not. Coordinating with Adult Protective Services and developing communication networks throughout individual communities has been and will continue to be vital in assisting the individuals that are the most vulnerable.

Commodities Program – With increasing cost of raw food, the commodities program available to assist meal programs in our area is vital. There is not participation by all Area Agencies and as a result, the selection of product is limited as there is less purchasing power for the program. This program helps the bottom line expenses for centers and county councils on aging. The program has continued to weaken through the years with less variety of products and could use an infusion of funding to make it stronger. The Commodity Supplemented Food Program (CSFP) continues to be a valuable resource for individuals residing in our communities. Given the frontier nature of our PSA, distribution sites are limited and getting the food to those that need it is a challenge.

B - 2 - 2 Solicitation and Input for Developing Plan

1. Meetings with Individual senior center boards and members to solicit their thoughts and ideas as they relate to necessary services and needs within their communities.
2. Meeting with county councils on aging to solicit their thoughts and ideas as they relate to necessary services and needs within their county & individual communities.
3. Holding public hearings / listening sessions to solicit input and gain an understanding of issues relating to the needs in specific geographical areas and communities.
4. Solicit written feedback from center boards, county council on aging and tribal authorities as well as individuals to obtain their thoughts, ideas regarding what is working and what is needed in their areas as it relates to service delivery.
5. Identified issues & concerns were compiled and used to establish the Area Plan, to establish goals and objectives for the plan as well as actions specific to each program or community.

B – 2 - 3 Findings

Through all of the activities to gather information to be used in the Area Plan, it was very obvious of the importance of the services provided throughout Area II. Often, the **Congregate or Home Delivered Meal** that an individual receives is their primary source of nutrition for that day. Meals are available without regard to an individual's ability to pay for that meal. Without the social opportunities created through senior center activities or councils on aging, many folks would be very isolated or rarely have contact with others in their communities. Transportation services offer folks the opportunity to attend to their

needs through medical appointments, rides to activities and shopping etc... **ADRC** activities allow individuals to access services and individuals to help them attend to issues necessary to take care of daily needs. **Senior Health Insurance Program** offers individuals new to Medicare with assistance and training with their understanding of benefits. They offer to individuals that have been on Medicare some guidance with figuring out their Medicare Part D Choices in the annual enrollment period which saves many thousands of dollars. During the most recent enrollment period, Counselors in our area saved individuals over \$ 820,000. **Ombudsman** services help folks navigate the choices they face in long-term-care (LTC) and help ensure resident rights and investigate and assist in resolving conflicts for those that reside in LTC facilities. **Senior Centers** not only provide the opportunity to participate in communities activities, but offer **Health Screening and Promotion** activities help individuals stay on top of their health issues and identify potential problems. **Respite** services allow individuals the opportunity to meet their needs even when their primary caregivers are unable to attend to them. **Elder Justice Programs** often provide the only advocacy and support an individual has available to them. As partners in service to seniors and individuals with disability, **Adult Protective Services** provides investigation and support services to our most vulnerable individuals living independently to help them reduce or remove the risk of physical, emotional, financial or sexual abuse and neglect. **Legal Support** services offer legal document clinics and consultation to individuals for solutions to complex problems they would otherwise not be able to afford. **Senior Medicare Patrol** offers folks education and support to understand their benefits and Medicare statements, but also the opportunity for problem resolution and fraud detection. **Volunteer Programs** such as **RSVP** and the **Alliance Volunteer Program** offer retired individuals the opportunity for productive contributions in using their skills to enhance their communities. All of these services combine to offer individuals opportunities for self-direction and available assistance to preserve independence and prevent outcomes such as institutional care.

Among the issues discussed, there were a number of areas identified for improvement as outlined below.

1. Need to sustain and increase funding support for key services authorized through the Older American's Act. Continue to address challenges with services necessary in hard to serve locations in the area. The advocacy for funding on a local, state and national level continues to be very important.
2. Need to address recruitment and participation efforts to maintain and strengthen available services through senior centers and county councils on aging.
3. Need to come up with solutions to offer more transportation options Throughout the Area II service area.
4. Advocate and provide education on the value of the commodity food program And what it provides to individuals that benefit from congregate and home delivered meals in our area. Continue to address the need for CSFP in our most frontier areas of the Area II service area.
5. Housing for seniors and for individuals with disabilities is often scarce or unavailable to the people that need it the most. This problem intensifies when people are of low income and/or have special needs that make accessibility an issue. Specific residential options such as assisted living for individuals who are low income is especially difficult and such facilities do not exist in many of the most rural or frontier locations.
6. Finding qualified caregivers and retaining or paying caregivers a competitive wage are issues faced by most agencies providing caregiving service in the area.
7. Access to available technology is an on-going problem. Many of the most rural areas have no cell phone or internet service available. Many senior centers lack funding to keep current with available technology.

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SECTION C

GOALS, OBJECTIVES and STRATEGIES

Goal # 1 – Address the need for increased funding for Core Older American's Act Programs. This would include all community services, access and in-Home Services under Title III within our service area.

Objectives - Goal # 1- To obtain adequate funding to not only maintain current level of services, but to allow for expansion of services to meet the needs of seniors regardless of their economic or social circumstances within our Planning and Service Area.

- Continue to communicate funding needs and issues in provision of services in our coverage area to State Unit on Aging (SUA).
- Involve stakeholders through education and advocacy for addressing funding needs.
- Continue and keep local Legislators and elected officials informed of the use and need of services and funding challenges to be addressed through Legislative process.
- Keep our United States Congressman and Senator's as well as their field staff aware of funding issues related to provision of services.
- Support and encourage fundraising activities by local service providers.

Strategies - Goal # 1 – The primary strategy for achieving this goal will be to provide education, advocacy and call for action to all stakeholders.

- Use the quarterly Area II Advisory Council meetings as a forum to provide education and information as well as seek input from stakeholders of services throughout the region.
- Communication with State Unit on Aging and Montana Area Agency on Aging Association (M4A) through quarterly meetings.
- Communication through letters, e-mails and telephone to provide for discussions with elected officials and their representatives concerning education, funding needs and to develop open communications.
- Elected officials or their representatives will be invited to quarterly Area II Advisory Council meetings.
- Discuss funding issues with individual local service providers during site visits and evaluations. Encourage fundraising as an opportunity to strengthen programs.

Goal # 2 – Increase available transportation in the area and specifically, offer more options for seniors in the most rural locations in our service area.

Objectives – Goal # 2 – Work with stakeholders to develop working solutions to

transportation issues in specific areas.

- Use regular budget / program review meetings with centers to identify specific issues relating to transportation needs or issues.
- Discuss transportation issues and problems with county councils on aging.
- Utilize State Unit on Aging staff to assist with problems and issues relating to transportation.
- Use quarterly Area II Advisory Council meetings as a forum to solicit input relating to transportation issues and provide educational opportunities relating to issues identified.

Strategies – Goal # 2 – The Primary strategy will be to use working agreements as a tool to expand transportation opportunities.

- Create formal or informal partnerships between programs with transportation programs and those without.
- Facilitate communication between individuals in areas with no transportation service and providers with Transportation Programs.
- Utilize available resources such as Legal Developer program and SUA to assist with contracts between programs.
- Use meetings with center boards, county councils on aging and other community resources to evolve and consider new and creative ideas and opportunities to meet the needs throughout our service area.

Goal # 3 – Increase attendance and utilization of available services throughout the planning service area.

Objectives - Goal # 3 – To increase individual participation in available community services for nutrition programs, transportation services health screenings and senior center activities.

- Use quarterly Area II Advisory Council meetings as a forum for information exchange between programs on best practices of attracting participation in their respective communities.
- Utilize available resources such as SUA, local, state, tribal and federal information to keep current on strategies available to increase participation.
- Utilize training opportunities such as the Governor's Conference on Aging, Montana Gerontology Society (MGS), public health fairs as forums to educate individuals of available services, programs and activities.

Strategies – Goal # 3 – The primary strategy will be to increase communication, collaboration and utilization of resources at our disposal to increase participation and use of services.

- Use budget and program review meetings as an opportunity to pass along information of the different things that other programs are doing to solicit

participation in their communities.

- Encourage communication between programs to discuss ideas and facilitate closer working relationships.
- Participate and encourage participation in scheduled conferences and workshops and use of available written material and webinars to increase knowledge of available strategies.
- Encourage individual centers to hold forums for input of information from individuals in local areas about what services they would like and how they would like them provided.

Goal # 4 – Provide a quality, efficient and cost effective Nutrition Program that assists individuals to meet their nutritional needs regardless of their economic or social circumstances.

Objectives – Goal # 4 – provide individual or Home Delivered Meals in a congregate or independent living environment, using established guidelines and use of USDA Commodities Program to reduce Program costs.

- Maintain or enhance congregate meal services throughout the service area and in communities that offer the greatest access for participation.
- Utilize the USDA Commodities Program products to reduce raw food expenses.
- Provide 1,265 individuals with at least 116,842 Home Delivered Meals in FY 2016.
- Provide 4,939 individuals with at least 236,480 Congregate Meals in FY 2016.

Strategies - Goal # 4 – Primary strategy will be to provide service and support to nutrition program sites and to develop open communication to facilitate problem resolution.

- Utilize SUA Nutritionist to review program menu's to ensure nutritional qualities.
- Hold Cook Workshops in two areas of the service area every other year.
- Area II office to coordinate orders for USDA Commodities Program and be the point of contact with State Intergovernmental Human Services Bureau.
- Continue to meet with Individual center board of directors for those small sites not supported by a county council on aging to review budgets and conduct program review and monitoring.
- Encourage centers and county councils on aging to have a mechanism for feedback from program participants about the nutrition programs services.
- All individuals are welcome to participate without regard to their ability to pay or social circumstances.

Goal # 5 – Be a voice in development of needed community services.

Objectives – Goal # 5 – Continue participation and advocacy for the creation of and improvement of services in our Planning and Service area and throughout the state.

- Continue to identify issues of importance or benefit to seniors in service area.
- Work with local, state, tribal & federal entities on issues of importance to seniors and vulnerable adults within our service area.
- Participate and support task forces or coalitions working on creation of services.
- Provide education and information to local, state, tribal and federal entities on the importance of specific services or the effect lack of those services have on individuals, families and local communities.

Strategies – Goal # 5 – Primary strategy will be to continue and participate with coalitions working toward creation or enhancement of services and continue to advocate for services necessary within the PSA and state.

- Continue to work as a member of Long-Term Care Choices Coalition.
- Continue to work as a member of Voices for Seniors Coalition including on sub-committees working for improvement with Guardianship and legal authority issues as well as on legislative priorities for senior services.
- Provide Information to local, state and tribal government officials as necessary.
- Provide Legislative testimony to committee's as necessary to educate and advocate for needed services.
- Use meetings with centers, county councils on aging and Area II Advisory Council meetings as forums to collect data on needed services.

Goal # 6 – Establish Veteran's Directed Home & Community Based Services Program in our service area.

Objectives Goal # 6 – Work with the State Unit on Aging and Veterans Administration to create an effective person-centered community program to meet the needs of Veterans within our planning and service area.

- Assist Veterans to stay in their communities and homes through provision of actual self-directed services.
- Establish Area II staff to provide service coordination to the Veteran.
- Establish contract with and communication with Conservatorship & Guardianship Corporation of Montana to Provide financial management services (FMS) to the Veteran and his/her employees.
- Communicate and follow protocol with Veteran's Administration.
- Utilize SUA staff to further develop program.

Strategies – Goal # 6 – The primary strategy will be to conduct business as we have agreed to do through our completed Program Readiness review.

- Receive and follow-up with referrals from Veteran's Administration Medical Center (VAMC)
- Follow established protocol as outlined in program Policy & Procedure Manual.
- Develop communication between program staff and local VAMC.
- Establish Billing process within guidelines of Veterans Administration for reimbursement to Area Agency for service funds expended.
- Serve a total of 45 Veteran's with up to 24 individuals served by the end of first year of service.

Goal # 7 – Provide advocacy and support to the most vulnerable seniors and individuals with disability in our service area.

Objectives – Goal # 7 – For seniors and individuals with disability within our service area to have necessary legal support and advocacy and live free from abuse, neglect, exploitation or mistreatment.

- Continue to use Legal Developer Program to provide one on one consultation as well as Legal Document Clinics to assist individuals meet their legal needs.
- Continue to work with Adult Protective Services as a community partner in the identification and resolution of situations involving abuse, neglect or exploitation.
- Participate in Adult Protection Teams.
- Continue to advocate for federal funds to support the program as provision of quality Ombudsman service costs far more than the program is funded with.
- Provide Ombudsman Services throughout the area to long-term care facilities such as nursing homes, assisted livings and critical access hospitals.
- Utilize our ADRC's as a mechanism to connect individuals to service options.

Strategies – Goal # 7 – The primary strategy will be to continue with strengthening our partnerships with Elder Justice Programs.

- Partner with Legal Developer Program to encourage and support legal clinics.
- Refer individuals who can benefit from legal consultation or services.
- Support Individual area agency staff to continue and serve on Adult Protection Teams.
- Ombudsman Program will follow the lead of the state Ombudsman Program.
- Ombudsman staff will strive to visit each facility in our service area one time per month in addition to any investigation visits.
- Ombudsman staff will be encouraged to attend resident council meetings at facilities.
- SUA staff will be informed regarding needs of the program on a local level.

Goal # 8 – Management Improvement – Nutrition Education

Objective – Goal # 8 – Improve quality and training available to Nutrition programs through creating educational opportunities in the Area.

- Offer more educational opportunities for staff of centers and County Councils on Aging.
- Utilize available Nutritionist through State Unit on Aging for nutritional analysis of menu's.
- Utilize the talents of individuals within the current nutrition programs to share information and skills with one another and at training events.

Strategies – Goal # 8 – The primary strategy will be to communicate with centers and county councils on aging and schedule trainings.

- Create workshops in Lewistown and Billings so that Congregate & Home Delivered Meal Program staff will have an opportunity to attend workshops conveniently located close to their communities. These workshops to be held every other year.
- Request nutrition programs to send menu's to the Nutritionist with the State Unit on Aging one time per year for nutritional analysis.
- Address training issues and opportunities during budget and program review visits with centers.

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SECTION D

**SERVICES TO BE PROVIDED
AND
SPECIAL PROJECTS**

SECTION D - 1 SERVICES TO BE PROVIDED

Name of Service	FY 2016 –Service Projections. Clients To Be Served	FY 2016 Projected Units of Service To Be Provided	Service Offered by County/Reservation
Case Management	117	8,603	Yes-All Areas
Congregate Meals	4,939	236,480	Yes-All Areas
Guardianship	8	4,160	Yes- All Areas
Health Screening & Promotion	593	2,683	Yes-All Areas
Home Delivered Meals	1,265	116,842	Yes, All Areas
Home Health Aide	35	1,167	Offered in Yellowstone / Carbon Counties
Homemaking	294	1,120	Offered in all areas except Golden Valley/Wheatland Counties
Information & Assistance / SHIP	6,481	15,954	Yes-All Areas
Nutrition Education	8,700	50	Yes-All Areas
Ombudsman	100	1,336	Yes, All Areas
Respite	9	820	Offered in all areas except Golden Valley / Wheatland Counties
Self-Directed Personal Assistance Service	24	25,004	Yes-All Areas

Senior Center	3,618	125,207	Yes-All Areas
Skilled Nursing	44	386	Offered in Yellowstone & Carbon Counties
Training	127	3	Yes-All Areas
Transportation	588	34,342	Offered in areas except Golden Valley, Judith Basin, Petroleum and Stillwater Counties

SECTION D -2 SPECIAL PROJECTS

VOICES FOR SENIORS - Recently, a senior coalition was formed in Yellowstone County. The name of the group is VOICES FOR SENIORS and it was born from the strategic planning process of the Adult Resource Alliance of Yellowstone County who is one of our subcontractors and partners in provision of services. Voices for Seniors involves the collaborative efforts of a vast group of providers of senior services and stakeholders in Yellowstone County including Area II staff.

The group identified a number of key issues affecting seniors in Yellowstone County and is committed to find solutions to address the identified issues. Among the first issues that the group is working on are; Guardianship Needs; Senior Hunger; Pet Care Respite; Transportation; Household Help and Legislative Advocacy.

The group is specific to Yellowstone County, but the issues are relevant in our entire service area. Area II administration will continue to participate with the activities and continued strengthening of this group. Currently there are subcommittees working on the identified issues. One of the benefits to this coalition is service providers working more effectively together for the common good of the individuals we serve.

Long-Term Care Coalition - Senior coalitions have been an important tool to accomplish goals in our area and state. The Senior Long-Term Care Coalition is a similar group that is working on a statewide basis to address issues with long-term care services to seniors and individuals with disability. This coalition has been in place for the past 8 plus years and is active with Advocacy with the Department of Public Health & Human Services as well as the Legislative Process. Area II administration will also continue with participation in this group.

Veterans Directed Home & Community Based Services – Area II Agency on Aging and the State Unit on Aging have been working in partnership to start this program within our area. The program will serve Veterans in our entire Planning and Service Area and will allow Veterans to receive services in their home. We have completed our readiness reviews and are in process of working through final details with the Veteran's Administration. Currently, Veterans have not had the choice of programs that feature person-centered planning and have had to receive their care at VA hospitals, nursing homes and domiciliary facilities. This will create an opportunity for all that to change and for Veterans to direct their own care.

Options Counseling – This program started in 2014 and is currently provided as an ADRC activity through the Adult Resource Alliance of Yellowstone County, Area II Agency on Aging and Fergus County Council on Aging. Training has been provided to other Information & Assistance and Senior Health Insurance Program Counselors throughout the area. The program provides assistance to individuals their family members, friends or service providers identify and address an individual's long-term care needs and help them through the maze of service options to come up with solutions specific to their needs. This service will continue to be promoted and developed throughout our planning and service area.

Aging & Disability Resource Center Activities – will continue to be provided throughout our Planning and Service Area. The main ADRC locations will be the Adult Resource Alliance of Yellowstone County, Area II Agency on Aging and Fergus County Council on Aging. Area II central office will continue as the contact for ADRC activities for communities and areas within our service area that do not have a designated ADRC site specific for their community or county. The centers will serve as one stop shops to reduce confusion and complexity in identifying and helping individuals attach to services, educate individuals new to Medicare, and to address benefit choices that will affect their wellbeing. Senior Medicare Patrol activities will also be carried out through ADRC staff with presentations at local senior centers and concerning SMP information and education.

Emergency Preparedness Plans – Area II Agency on Aging will work on revision to our own emergency preparedness plan through our Safety Committee and will ask our subcontractors to update their plan or create a plan if they do not have one in place. This will ensure the safety of participant and program staff during program activities. All subcontractors will also be encouraged to participate with state, local, tribal and federal planning efforts to insure that the needs of all elderly residents are considered in county/reservation emergency plans.

Branch Accounting - The Area II Agency on Aging provides branch accounting service to senior centers without the oversight of a County Council on Aging. During the program assessment process there is a review of the Title IIIB, IIIC1 and IIIC2 budgets. During the budget review, we analyze what the beginning allocation was, what are the current revenues and expenditures and what is the budget balance. When there is a decrease in revenue, expenditures are adjusted to provide for a balanced budget. An ending tentative checkbook balance is anticipated for each program. When there is an anticipated deficit in the budget, the Area Agency has an assurance from the individual senior center board of directors that sufficient revenue can be deposited into the account so there will be equal revenue to cover the expenditures.

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SECTION E

BUDGETS

SECTION E – 1 AREA AGENCY ADMINISTRATIVE BUDGET

SECTION E-1	FY 2016	AREA AGENCY ON AGING ADMINISTRATION	
			TOTAL
EXPENDITURE CATEGORIES		ADMINISTRATION BUDGET	AREA II AGENCY ON AGING ADMINISTRATION BUDGET
Personnel		124235	124235
Supplies		11955	11955
Raw Food/Meals			0
Raw Food/Commodities			0
Communications		1500	1500
Utilities		1673	1673
Repairs/Maintenance			0
Travel & Training		17308	17308
Building Space		9120	9120
Insurance		1000	1000
Equipment		3080	3080
Contract Service		3200	3200
Other		14010	14010
Audit		1720	1720
Indirect Costs			0
Total Expenses:	0	188801	188801
SOURCES OF FUNDING			
Carryover		0	0
III - B		23825	23825
III - B Ombudsman			0
III - C1		33581	33581
III - C2		19243	19243
III - E		12966	12966
III - D			0
Elder Abuse			0
VII Ombudsman			0
SHIP			0
State GF (GF/PR/Add'l/OTO)		3200	3200
Other Federal/State			0
NSIP			0
Sub-Total	0	92815	92815
Local Match		30938	30938
Commodities			0
Project Income			0
Other Resources		65048	65048
TOTAL	0	188801	188801
Unduplicated Clients			0
Units of Service			0
AREAWIDE DIRECT SERVICES TOTAL:		188801	188801

SECTION E – 2 AREA WIDE SERVICES BUDGET

SECTION E-2	FY 2016	AREA WIDE SERVICES BUDGET										TOTAL AREA WIDE SERVICES
EXPENDITURE CATEGORIES	INFORMATION & ASSISTANCE SERVICES	SHIP COUNSELING SERVICES	CASE MANAGEMENT SERVICES	SELF-DIRECTED PERSONAL ASSISTANCE SERVICES	LEGAL ASSISTANCE SERVICES	OMBUDSMAN SERVICES	NUTRITION EDUCATION SERVICES	TRAINING SERVICES	GUARDIANSHIP SERVICES			
Personnel	64995	57875	289970	43987		145726						992433
Supplies	4695	3460	21962	3730		750		350	100			35047
Raw Food/Meals												0
Raw Food/Commodities												0
Communications	5100	1500	1500	1500		3800						13400
Utilities	1673	1673	1673	1673		1800						8492
Repairs/Maintenance												0
Travel & Training	2600	12295	20400	7500		13900		7530	4547			70238
Building Space	7200	7200	7200	7200								28800
Insurance	1250	1250	3100	1900		1250						8750
Equipment	1460	1660	4483	3867		3460						14930
Contract Service			1726764		254299							1981063
Other	13049	36708	189063	32258		34210		4828				310298
Audit	1720	1035	1720	1720		1035						7230
Indirect Costs												0
Total Expenses:	103742	124656	2267835	495215	254299	205931	1648	12708	4647			3470681
SOURCES OF FUNDING												
Carryover		26136										77340
III - B						45222	1401	4581				6340
III - B Ombudsman						80195		6340				80195
III - C1					69327							69327
III - C2					2454							7454
III - E												19013
III - D												0
Elder Abuse												2317
VII Ombudsman						17208						17208
SHIP		74042										74042
State GF (GF/PRA/ADD/OTD)		45254	20806		180201	41933		568				288762
Other Federal/State		18431	320768	394854								734053
NSIP												0
Sub-Total	87698	120984	320768	394854	254299	184558	1401	11489	0			1376051
Local Match	8247	3672	88215			21373	247	1219				122973
Commodities												0
Project Income	7315		74072	15477								96884
Other Resources	482		1784780	84884	0							1874793
TOTAL	103742	124656	2267835	495215	254299	205931	1648	12708	4647			3470681
Unduplicated Clients	927		117	24		83	8700	127	8			9966
Units of Service	3,502		8603	25004		1,106	50	3	4160			42428
AREAWIDE DIRECT SERVICES TOTAL:	103742	124656	2267835	495215	254299	205931	1648	12708	4647			3470681

SECTION E – 3 CONTRACTED SUPPORT SERVICES BUDGET

SECTION E-3	FY 2016		CONTRACTED SUPPORT SERVICES BUDGETS		
EXPENDITURE CATEGORIES	TRANSPORTATION SERVICES	SENIOR CENTER SERVICES	OMBUDSMAN SERVICES	INFORMATION & ASSISTANCE SERVICES	TOTAL CONTRACTED SERVICES
Personnel	215742	293276	23990	290690	823698
Supplies	12253	25947	1100	11240	50540
Raw Food/Meals					0
Raw Food/Commodities					0
Communications	5023	7517	740	7000	20280
Utilities	2392	39116	750	7400	49658
Repairs/Maintenance	132740	4940		1500	139180
Travel & Training	12558	11059	2207	5780	31604
Building Space	11050	23080	1600	22574	58304
Insurance	11784	6361	400	3200	21745
Equipment	2000	34677			36677
Contract Service	75869	111503		6500	193872
Other	34	31267		4904	36205
Audit					0
Indirect Costs	2187			256	2443
Total Expenses:	483632	588743	30787	361044	1464206
SOURCES OF FUNDING					
Carryover					0
III - B	26993	149325			176318
III - B Ombudsman					0
III - C1					0
III - C2					0
III - E			7415	78562	85977
III - D					0
Elder Abuse					0
VII Ombudsman					0
SHIP				3000	3000
State GF (GF/PR/Add'l/OTO)	59004	84322	11025	72600	226951
Other Federal/State	160928	400		25100	186428
NSIP					0
Sub-Total	246925	234047	18440	179262	678674
Local Match	13360	28929	2472	37628	82389
Commodities					0
Project Income	61212	78093			139305
Other Resources	162135	247674	9875	144154	563838
TOTAL	483632	588743	30787	361044	1464206
Unduplicated Clients	588	3618	17	5554	9777
Units of Service	34342	125207	230	12452	172231
AREAWIDE DIRECT SERVICES TOTAL:	483632	588743	30787	361044	1464206

SECTION E – 5 CAREGIVER SERVICES BUDGET

SECTION E-5	FY 2016			CAREGIVER SERVICES BUDGET
EXPENDITURE CATEGORIES	HOMEMAKER SERVICES	HOME HEALTH AIDE SERVICES	RESPIRE SERVICES	TOTAL CAREGIVER SERVICES
Personnel	361718	62304	40975	464997
Supplies	11301	7538	5838	24677
Raw Food/Meals				0
Raw Food/Commodities				0
Communications	2532	1562	2043	6137
Utilities			500	500
Repairs/Maintenance				0
Travel & Training	14529	5000	5500	25029
Building Space	10251	6277	6677	23205
Insurance	4155	2258	2759	9172
Equipment				0
Contract Service	1774	771	771	3316
Other	2952	5335		8287
Audit	2175	2175	2175	6525
Indirect Costs	7886			7886
Total Expenses:	419273	93220	67238	579731
SOURCES OF FUNDING				
Carryover				0
III - B	16088	3127	0	19215
III - B Ombudsman				0
III - C1				0
III - C2				0
III - E			8463	8463
III - D				0
Elder Abuse				0
VII Ombudsman				0
SHIP				0
State GF (GF/PR/Add'l/OTO)	81742	36324	36113	154179
Other Federal/State	32872	1478	1476	35826
NSIP				0
Sub-Total	130702	40929	46052	217683
Local Match	13307	3382	6545	23234
Commodities				0
Project Income	87238	14784	4108	106130
Other Resources	188026	34125	10533	232684
TOTAL	419273	93220	67238	579731
Unduplicated Clients	294	35	9	338
Units of Service	13120	1167	820	15107
AREAWIDE DIRECT SERVICES TOTAL:	419273	93220	67238	579731

SECTION E – 8 GRAND TOTAL AREA AGENCY BUDGET

SECTION E-8	FY 2016	SERVICE BUDGETS - GRAND TOTAL							TOTAL SERVICES BUDGETS
EXPENDITURE CATEGORIES	ADMINISTRATIVE SERVICES	AREA WIDE SERVICES	CONTRACTED SUPPORT SERVICES	PREVENTIVE HEALTH SERVICES	CAREGIVER SERVICES	CONGREGATE MEALS SERVICES	HOME DELIVERED MEALS SERVICES		
Personnel	124235	992433	823698	63312	464997	906061	455689	3830425	
Supplies	11955	35047	50540	9559	24677	62371	67632	261791	
Raw Food/Meals	0	0	0	0	0	511610	266968	798578	
Raw Food/Commodities	0	0	0	0	0	70168	29333	99501	
Communications	1500	13400	20280	1835	6137	22448	6400	72000	
Utilities	1673	8492	49658	416	500	72280	8500	141519	
Repairs/Maintenance	0	0	139180	0	0	9405	6800	155385	
Travel & Training	17308	70238	31604	5400	25029	36791	69265	256635	
Building Space	9120	28800	58304	8269	23205	68283	24056	220037	
Insurance	1000	8750	21745	2258	9172	24383	3703	71014	
Equipment	3080	14930	36677	0	0	109203	9702	173592	
Contract Service	3200	1981063	193872	2641	3316	40994	22894	2247980	
Other	14010	310298	36205	1743	8287	11500	1573	383616	
Audit	1720	7230	0	4675	6625	0	0	20150	
Indirect Costs	0	0	2443	0	7886	19221	39298	68848	
Total Expenses:	188801	3470681	1464206	100118	579731	1964718	1031813	8600068	
SOURCES OF FUNDING									
Carryover	0	77340	0	0	0	0	0	77340	
III - B	23825	6340	176318	0	19215	0	0	225698	
III - B Ombudsman	0	80195	0	0	0	0	0	80195	
III - C1	33581	69327	0	0	0	375932	0	478840	
III - C2	19243	7454	0	0	0	0	104637	131334	
III - E	12966	19013	85977	0	8463	0	0	126419	
III - D	0	0	0	20244	0	0	0	20244	
Elder Abuse	0	2317	0	0	0	0	0	2317	
VII Ombudsman	0	17208	0	0	0	0	0	17208	
SHIP	0	74042	3000	0	0	0	0	77042	
State GF (GF/PR/Add//OTO)	3200	288762	226951	32248	154179	354222	112376	1171938	
Other Federal/State	0	734053	186428	2513	35826	77675	88616	1125111	
NSIP	0	0	0	0	0	83032	41485	124517	
Sub-Total	92815	1376051	678674	55005	217683	890861	347114	3658203	
Local Match	30938	122973	82389	7302	23234	84688	36993	388517	
Commodities	0	0	0	0	0	70168	29333	99501	
Project Income	0	96864	139305	30865	106130	714284	265519	1352967	
Other Resources	65048	1874793	563838	6946	232684	204717	352854	3300880	
TOTAL	188801	3470681	1464206	100118	579731	1964718	1031813	8800068	
Unduplicated Clients	0	9986	9777	637	338	4939	1265	26942	
Units of Service	0	42428	172231	3079	15107	236480	116842	586167	
AREAWIDE DIRECT SERVICES TOTAL:	188801	3470681	1464206	100118	579731	1964718	1031813	8800068	

AREA II AGENCY ON AGING

AREA PLAN

SECTION F

ATTACHMENTS

ATTACHMENT A

AOA ASSURANCES AND ACTIVITIES

ASSURANCES

States must assure that the following assurances (Section 306) will be met by its designated area agencies on agencies. The Area Agency on Aging assures that it will meet the following assurances.

Area II Agency on Aging assures that the following assurances (section 306) will be met by the Area Agency on Aging and its designated local providers in the Planning and Service Area.

Sec. 306(a), AREA PLANS

(2) Each area agency on aging shall provide assurances that an adequate proportion, as required under section 307(a) (2), of the amount allotted for part B to the planning and service area will be expended for the delivery of each of the following categories of services-

(A) services associated with access to services (transportation, health services (including mental health services), outreach, information and assistance (which may include information and assistance to consumers on availability of services under part B and how to receive benefits under and participate in publicly supported programs for which the consumer may be eligible), and case management services);

(B) in-home services, including supportive services for families of older individuals who are victims of Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and

(C) legal assistance;

and assurances that the area agency on aging will report annually to the State agency in detail the amount of funds expended for each such category during the fiscal year most recently concluded.

(4)(A)(i)(I) provide assurances that the area agency on aging will-

(aa) set specific objectives, consistent with State policy, for providing services to older individuals with greatest economic need, older individuals with greatest social need, and older individuals at risk for institutional placement;

(bb) include specific objectives for providing services to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas; and

(II) include proposed methods to achieve the objectives described in items (aa) and (bb) of subclause (1);

(ii) provide assurances that the area agency on aging will include in each agreement made with a provider of any service under this title, a requirement that such provider will-

(1) specify how the provider intends to satisfy the service needs of low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in the area served by the provider;

(II) to the maximum extent feasible, provide services to low-income minority individuals,

older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; and

(III) meet specific objectives established by the area agency on aging, for providing services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area; and

(4)(A)(iii) With respect to the fiscal year preceding the fiscal year for which such plan is prepared, each area agency on aging shall—

(1) identify the number of low-income minority older individuals and older individuals residing in rural areas in the planning and service area;

(II) describe the methods used to satisfy the service needs of such minority older individuals; and

(III) provide information on the extent to which the area agency on aging met the objectives described in clause (a) (4) (A) (i).

(4)(B)(i) Each area agency on aging shall provide assurances that the area agency on aging will use outreach efforts that will identify individuals eligible for assistance under this Act, with special emphasis on--

(I) older individuals residing in rural areas;

(II) older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);

(III) older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas);

(IV) older individuals with severe disabilities;

(V) older individuals with limited English proficiency;

(VI) older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and

(VII) older individuals at risk for institutional placement; and

(4)(C) Each area agency on agency shall provide assurance that the area agency on aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas.

(5) Each area agency on aging shall provide assurances that the area agency on aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement, with agencies that develop or provide services for individuals with disabilities.

(6)(F) Each area agency will:

in coordination with the State agency and with the State agency responsible for mental health services, increase public awareness of mental health disorders, remove barriers to diagnosis and treatment, and coordinate mental health services (including mental health screenings) provided with funds expended by the area agency on aging with mental health services provided by community health centers and by other public agencies and nonprofit private organizations;

(9) Each area agency on aging shall provide assurances that the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 307(a) (9), will expend not less than the total amount of funds appropriated under this Act and expended by the

agency in fiscal year 2000 in carrying out such a program under this title.

(11) Each area agency on aging shall provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as "older Native Americans"), including-

(A) information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, an assurance that the area agency on aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under this title;

(B) an assurance that the area agency on aging will, to the maximum extent practicable, coordinate the services the agency provides under this title with services provided under title VI; and

(C) an assurance that the area agency on aging will make services under the area plan available, to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans.

(13)(A) Each area agency on aging shall provide assurances that the area agency on aging will maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships.

(13)(B) Each area agency on aging shall provide assurances that the area agency on aging will disclose to the Assistant Secretary and the State agency--

(i) the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals; and

(ii) the nature of such contract or such relationship.

(13)(C) Each area agency on aging shall provide assurances that the area agency will demonstrate that a loss or diminution in the quantity or quality of the services provided, or to be provided, under this title by such agency has not resulted and will not result from such non-governmental contracts or such commercial relationships.

(13)(D) Each area agency on aging shall provide assurances that the area agency will demonstrate that the quantity or quality of the services to be provided under this title by such agency will be enhanced as a result of such non-governmental contracts or commercial relationships.

(13)(E) Each area agency on aging shall provide assurances that the area agency will, on the request of the Assistant Secretary or the State, for the purpose of monitoring compliance with this Act (including conducting an audit), disclose all sources and expenditures of funds such agency receives or expends to provide services to older individuals.

(14) Each area agency on aging shall provide assurances that funds received under this title will not be used to pay any part of a cost (including an administrative cost) incurred by the area agency on aging to carry out a contract or commercial relationship that is not carried out to implement this title.

(15) provide assurances that funds received under this title will be used-

- (A) to provide benefits and services to older individuals, giving priority to older individuals identified in paragraph (4) (A) (i); and
 - (B) in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;
- (17) Each Area Plan will include information detailing how the Area Agency will coordinate activities and develop long-range emergency preparedness plans with local and State emergency response agencies, relief organizations, local and State governments and other institutions that have responsibility for disaster relief service delivery.

REQUIRED ACTIVITIES

The State Agency:

- (A) requires each area agency on aging designated under section 305(a)(2)(A) to develop and submit to the State agency for approval, in accordance with a uniform format developed by the State agency, an area plan meeting the requirements of section 306; and
- (B) The State plan is based on such area plans.
- (C) affords an opportunity for a public hearing upon request, in accordance with published procedures, to any area agency on aging submitting a plan under this title, to any provider of (or applicant to provide) services;
- (D) issues guidelines applicable to grievance procedures required by section 306(a) (10); and
- (E) affords an opportunity for a public hearing, upon request, by an area agency on aging, by a provider of (or applicant to provide) services, or by any recipient of services under this title regarding any waiver request, including those under Section 316.
- (F) The State agency will make such reports, in such form, and containing such information, as the Assistant Secretary may require, and comply with such requirements as the Assistant Secretary may impose to insure the correctness of such reports.
- (G) No supportive services, nutrition services, or in-home services are directly provided by an area agency on aging in the State, unless, in the judgment of the State agency—
 - (i) provision of such services by the area agency on aging is necessary to assure an adequate supply of such services;
 - (ii) such services are directly related to such area agency on aging's administrative functions; or
 - (iii) such services can be provided more economically, and with comparable quality, by such area agency on aging.

The Area Agency:

- (A) evaluates the need for supportive services, including information and assistance, and transportation services, nutrition services, and multipurpose senior centers within the area;
- (B) has developed a process to determine the extent to which public or private programs and resources (including Department of Labor Senior Community Service Employment Program participants, and programs and services of voluntary organizations) have the capacity and actually meet such need;
- (C) will conduct periodic evaluations of activities and projects carried out in the area under this title and title VII, including evaluations of the effectiveness of services provided to individuals with greatest economic need, greatest social need, or disabilities (with particular attention to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas). Note: "Periodic" (defined in 45CFR Part 1321.3) means, at a minimum, once each fiscal year.

Todd Wood, Director, Area II Agency on Aging

Date: 03/20/2015

Kelly Gebhardt , Governing Board Chairman
Area II Agency on Aging

Date 03/20/2015

ATTACHMENT B

INFORMATION REQUIREMENTS

The Area Agency must provide all applicable information to the State for each of the following OAA citation listed below. The completed attachment must be included with your Area Plan submission.

Section 305(a) (2) (E)

Describe the mechanisms) for assuring that preference will be given to providing services to older individuals with greatest economic need and older individuals with greatest social need, (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) and include proposed methods of carrying out the preference in the State plan;

Section 306(a) (17)

Describe the mechanism(s) for assuring that each Area Plan will include information detailing how the Area Agency will coordinate activities and develop long-range emergency preparedness plans with local and State emergency response agencies, relief organizations, local and State governments and other institutions that have responsibility for disaster relief service delivery.

Section 307(a) (2)

The plan shall provide that the State agency will:

(C) *Specify a minimum proportion of the funds received by each area agency on aging in the State to carry out part B that will be expended (in the absence of a waiver under sections 306 (c) or 316) by such area agency on aging to provide each of the categories of services specified in section 306(a) (2) (Note: those categories are access, in-home, and legal assistance).*

Section (307(a) (3)

The plan shall:

(B) with respect to services for older individuals residing in rural areas:

(i) provide assurances the State agency will spend for each fiscal year of the plan, not less than the amount expended for such services for fiscal year 2000.

(ii) identify, for each fiscal year to which the plan applies, the projected costs of providing such services (including the cost of providing access to such services).

(iii) describe the methods used to meet the needs for such services in the fiscal year preceding the first year to which such plan applies.

Section 307(a) (10)

The plan shall provide assurance that the special needs of older individuals residing in rural areas are taken into consideration and shall *describe how those needs have been met and describe how funds have been allocated to meet those needs.*

Section 307(a) (14)

(14) The plan shall, with respect to the fiscal year preceding the fiscal year for which such plan is prepared-

(A) *identify the number of low-income minority older individuals in the State, including the number of low income minority older individuals with limited English proficiency; and*

(B) *describe the methods used to satisfy the service needs of the low-income minority older individuals described in subparagraph (A), including the plan to meet the needs of low-income minority older individuals with limited English proficiency.*

Section 307(a) (21)

The plan shall:

(B) provide an assurance that the State agency will pursue activities to increase access by older individuals who are Native Americans to all aging programs and benefits provided by the agency, including programs and benefits provided under this title (*title III*), if applicable, *and specify the ways in which the State agency intends to implement the activities.*

Section 307(a) (29)

The plan shall include information detailing how the State will coordinate activities, and develop long-range emergency preparedness plans, with area agencies on aging, local emergency response agencies, relief organizations, local governments, State agencies responsible for emergency preparedness, and any other institutions that have responsibility for disaster relief service delivery.

Section 307(a) (30)

The plan shall include information describing the involvement of the head of the State agency in the development, revision, and implementation of emergency preparedness plans, including the State Public Health Emergency Preparedness and Response Plan.

Section 705(a) (7)

In order to be eligible to receive an allotment under this subtitle, a State shall *include in the State plan submitted under section 307:*

(7) *a description of the manner in which the State agency will carry out this title in accordance with the assurances described in paragraphs (1) through (6).*

(Note: Paragraphs (1) of through (6) of this section are listed below)

In order to be eligible to receive an allotment under this subtitle, a State shall include in the State plan submitted under section 307:

(J) an assurance that the State, in carrying out any chapter of this subtitle for which the State receives funding under this subtitle, will establish programs in accordance with the requirements of the chapter and this chapter;

(2) an assurance that the State will hold public hearings, and use other means, to obtain the views of older individuals, area agencies on aging, recipients of grants under title VI, and other interested persons and entities regarding programs carried out under this subtitle;

(3) an assurance that the State, in consultation with area agencies on aging, will identify and prioritize statewide activities aimed at ensuring that older individuals have access to, and assistance in securing and maintaining, benefits and rights;

(4) an assurance that the State will use funds made available under this subtitle for a chapter in addition to, and will not supplant, any funds that are expended under any Federal or State law in existence on the day before the date of the enactment of this subtitle, to carry out each of the vulnerable elder rights protection activities described in the chapter;

(5) an assurance that the State will place no restrictions, other than the requirements referred to in clauses (i) through (iv) of section 7J 2 (a)(5) (C), on the eligibility of entities for designation as local Ombudsman entities under section 712(a)(5);

(6) an assurance that, with respect to programs for the prevention of elder abuse, neglect, and exploitation under chapter 3--

(A) in carrying out such programs the State agency will conduct a program of services consistent with relevant State law and coordinated with existing State adult protective service activities for:

(i) public education to identify and prevent elder abuse;

(ii) receipt of reports of elder abuse;

(Hi) active participation of older individuals participating in programs under this Act through outreach, conferences, and referral of such individuals to other social service agencies or sources of assistance if appropriate and if the individuals to be referred consent; and

(iv) referral of complaints to law enforcement or public protective service agencies if appropriate;

(B) the State will not permit involuntary or coerced participation in the program of services described in subparagraph (A) by alleged victims, abusers, or their households, and

(C) all information gathered in the course of receiving reports and making referrals shall remain confidential except :

(i) if all parties to such complaint consent in writing to the release of such information;

(if) if the release of such information is to a law enforcement agency, public protective service agency, licensing or certification agency, ombudsman program, or protection or advocacy system; or

(iii) upon court order.

Attachment B

Services within Area II are provided to individuals throughout the planning and service area in locations that are the most convenient for participants of those programs. For most participants, that means in the community that they reside in or closest to. That can also mean in their selected place of domicile. Services are designed to benefit those with greatest social and economic needs, but no one is asked to disclose their own financial or social circumstances. Individuals with limited English proficiency are rare within our area, but if that is the case, accommodations are provided for them to obtain the service. On the reservations that we serve, many participants choose to speak their native languages and English is not the first language of choice.

The Area Agency will coordinate activities involving long-range emergency preparedness plans through budget and program evaluations with programs that are not served by county councils on aging or communication with county councils on aging regarding their plans and collaboration with state, tribal and federal agencies and relief organizations on the development of their plans.

The Area Agency will cooperate and comply with contracts as established with the State Unit on Aging for the provision of services, reporting responsibilities and such information as is required to adhere to state and federal requirements in provision of said services.

ATTACHMENT C

AREA FUNDING FORMULA and ALLOCATION

The following describes the allocation (funding) formula established and used by the Area Agency on Aging for the distribution of funds to the counties, reservation and/or projects for services to be provided in the planning and service area under the Older Americans Act.

Title IIIB (Support Services Funding) is a General Base Amount per County / Reservation per Office on Aging allocation to Area II Agency on Aging for those individuals 60 years of age and older. The balance of the money after the General Base amount is then allocated on a 70% share on population of those 60 years of age and older, then 20% share on low income of those 60 years of age or older and finally a 10 % share of minority of those 60 years of age or older. (Base plus 70/20/10 Formula)

Title IIIC (Congregate and Home Delivered Meals Funding) are allocated on the same basis as title IIIB with a Base plus 70/20/10 Formula.

Title IIID (Health Promotion) and IIIE (Caregiver) are allocated on the same basis of Base plus 70/20/10 Formula.

State Funds – are allocated on the same process of Base plus 70/20/10 Formula.

Breakdown of funding by County / Reservation

Current Contract Revenue Allocation Per County

	TOTAL
COUNTY	STATE & FEDERAL FUNDS
Big Horn	\$ 79,266.00
Carbon	\$ 135,524.00
Crow	\$ 75,902.00
Fergus	\$ 185,303.00
Golden Valley	\$ 25,137.00
Judith Basin	\$ 45,963.00
Musselshell	\$ 66,812.00
Northern Cheyenne	\$ 41,180.00
Petroleum	\$ 18,810.00
Stillwater	\$ 81,320.00
Sweet Grass	\$ 50,650.00
Wheatland	\$ 47,627.00
Yellowstone	\$ 820,268.00
TOTAL	\$ 1,673,762.00

ATTACHMENT D

GOVERNING and ADVISORY BOARD MEMBERS and TERMS OF OFFICE

AREA AGENCY GOVERNING BOARD PROFILE

1. General Responsibilities of Governing Board:

The Board shall be responsible for all policies and procedures pertinent to the operation and administration of this Agency. The Chairman of the Board shall be the chief officer of the Agency. The Secretary/Treasurer or Chairman shall be one (1) of two (2) signatures on the Agency Administrator=s and Fiscal Administrator=s check for wages. The day-to-day operation of the Agency is handled by the Administrator and Fiscal Administrator. Matters pertaining to policy change and procedure change will be approved or disapproved by the Executive Board. The Executive Board approves the allocation per each program. The Executive Board offers guidance for the course of action that should be taken for various matters that arise.

2. Governing Board Members and Terms of Office:

Board Member	Contact Information	Term
District # 1		
Ken Ronish, / 712 Main Street, Lewistown, MT 59457	406-567-2466	07/01/14 to 06/30/16
District # 2		
Kelly Gebhardt / 20 Skyline Dr. Roundup, MT 59072	406-323-2679	07/01/13 to 06/30/15
District # 3		
Susan Mosness / P.O. Box 888, Big Timber, MT 59011	406-668-7613	07/01/13 to 06/01/15
District # 4		
William Rivers / P.O. Box 88, Fromberg, MT 59029	406-668-7613	07/01/14 to 06/30/16

District # 5

Bill Kennedy / P.O. Box 35000, Billings, MT 59107 406-256-2701 07/01/14 to 06/30/16

District # 6

Andrew Russell / P.O. Box 159, Crow Agency, MT 59022 406-638-3708 07/01/13 to 06/30/15

Advisory Council Representative

Frank Teeters / P.O. Box 606, Bridger, MT 59014 406-662-5092 07/01/14 to 07/01/15

AREA AGENCY ADVISORY COUNCIL PROFILE

The Area Agency on Aging and/or the Area Governing Board has established an advisory council consisting of older individuals (including minority individuals) who are participants or who are eligible to participate in programs under the Older Americans Act, representatives of older individuals, local elected officials 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.

1. General Responsibilities of Advisory Council:

The Council shall make recommendations and requests to the Board of Directors for the promotion and development of the interest of the elderly in the counties. The Council shall advise the Board of Directors on matters brought before it for consideration.

2. Advisory Council Members and Terms of Office:

Board Member	Contact Information	Term
<u>Big Horn County</u>		
Consumer Representative Etta Kolkowski / P.O. Box 346, Hardin, MT 59034 / 406-665-1627		07/01/14 to 06/30/15
Commissioner Representative Sidney Fitzpatrick / P.O. Box 908, Hardin, MT 59034 406-665-9700		07/1/14 to 06/30/15
<u>Carbon County</u>		
Consumer Representative Frank Teeters / P.O. Box 606, Bridger, MT 59014 406-662-5092		07/01/14 to 06/30/15
Commissioner Representative		

John Grewell / P.O. Box 887, Red Lodge, MT 59068 406-446-1598 07/01/14 to 06/30/15

Fergus County

Consumer Representative

Patrick Ginnaty / 203 Uranium Dr. Lewistown 59457 406-366-5138 07/01/14 to 06/30/15

Commissioner Representative

Ross Butcher / 712 Main Street, Lewistown, MT 59457 406-535-5119 02/06/15 to 06/30/15

Golden Valley County

Consumer Representative

Donna Mae (Kay) Lasater / P.O. Box 235, Ryegate, MT 59074 406-568-2575 07/01/14 to 06/30/15

Commissioner Representative

Bob Lehfeldt / P.O. Box 175, Ryegate, MT 59074 406-636-2731 07/01/14 to 06/30/15

Judith Basin County

Consumer Representative

Rosalie Bruchez / P.O. Box 176, Hobson, MT 59452 406-423-5279 07/01/14 to 06/30/15

Commissioner Representative

Cody McDonald / Judith Basin Co. Courthouse, Stanford Mt 59479 07/01/14 to 06/30/15
406-566-2217 Ext. 108

Musselshell County

Consumer Representative

Florence Wacker / 1202 1st St. W, Roundup, MT 59072 406-323-3833 07/01/14 to 06/30/15

Commissioner Representative

Robert Goffena / 506 Main St. Roundup, MT 59072 406-323-1495

Petroleum County

Consumer Representative

Gary Gershmel / P.O. Box 93, Winnett, MT 59087 406-429-5511 07/01/14 to 06/30/15

Commissioner Representative

Larry Ahlgren / P.O. Box 226, Winnett, MT 59087 406-429-5311 07/01/14 to 06/30/15

Stillwater County

Consumer Representative

George Bokma / P.O. Box 1193, Columbus, MT 59019 406-322-5682 07/01/14 to 06/30/15

Commissioner Representative

Gerald Dell / P.O. Box 970, Columbus, MT 59019 406-322-8010 07/01/14 to 06/30/15

Sweet Grass County

Consumer Representative
Helen Pedula / P.O. Box 599, Big Timber, MT 59011 406-932-5743 07/01/14 to 06/30/15

Commissioner Representative
Jim Esp / P.O. Box 445, Big Timber, MT 59011 406-932-5607 07/01/14 to 06/30/15

Wheatland County

Consumer Representative
Irene Schuchard / P.O. Box 468, Harlowton, MT 59036 406-632-5844 07/01/14 to 06/30/15

Commissioner Representative
Tom Bennett / 506 1SE, Harlowton, MT 59036

Yellowstone County

Consumer Representative
Faye Marsh / 2020 Parkhill Drive, Billings, MT 59102 406-252-3753 07/01/14 to 06/30/15

Commissioner Representative
Vacant

Crow Tribe

Consumer Representative
Jackie Three Irons / HC36 Box 2205, Hardin, MT 59034 406-638-4449 07/01/14 to 06/30/15

Tribal Representative
Kayle Howe / P.O. Box 542, Crow Agency, MT 59022 406-638-4449 07/01/14 to 06/30/15

Northern Cheyenne Tribe

Consumer Representative
Teddy McMakin / P.O. Box 911, Lame Deer, MT 59043 406-477-6721 07/01/14 to 06/30/15

Tribal Representative
Hugh Clubfoot / P.O. Box 851 Lame Deer MT 59043 406-477-8707 07/01/14 to 06/30/15

ATTACHMENT E

PROVIDER PROFILE

The following is a list of the providers, by county or reservation, who the Area Agency on Aging contracts with to provide services to the senior citizens in the planning and service area. The provider agencies and organizations which have been identified and designated by the Area Agency on Aging as a “focal point” for comprehensive service delivery in each county in the Planning and Service Area are identified as such.

Big Horn County

Provider name/address: List services provided Contact Information

Big Horn Cty Council on Aging 317 N. Custer Avenue Hardin, MT 59034	Congregate Meals Home Delivered Meals Transportation Health Screening Foot Clinics In Home / Respite Services Senior Citizens Center Information and Assistance Focal Point	Joni Schaff – Director 406-665-2581
Helping Hands in Hardin P.O. Box 125 Hardin, MT 59034	CSFP Individual Commodity Food Box Program for Big Horn County	Linda Conner – Director 406-679-1525
Heritage Acres 200 N. Mitchell Hardin, MT 59034	Congregate Meals	Paula Small-Administrator 406-665-9251
Lodge Grass Wyola Senior Center P.O. Box 465 Lodge Grass, MT 59050	Congregate Meals Home Delivered Meals Senior Citizens Center Focal Point	Merla Mullenberg – Director 406-639-2265

Carbon County

Provider name/address: List services provided Contact Information

Belfry Senior Citizens Center Belfry, MT 59008	Congregate Meals Home Delivered Meals Senior Citizens Center Health Screening Foot Clinics Focal Point	Sam Krum-President 406-664-3209
Boyd Old Schooler's P.O. Box 263 Boyd, MT 59013	Congregate Meals Senior Citizens Center Focal Point	Judith Strobbe-President 406-425-3954
Bridger Golden Age Society P.O. Box 227 Bridger, MT 59014	Congregate Meals Home Delivered Meals Senior Citizens Center Health Screening Foot Clinics Focal Point	Frank Teeters-President 406-662-5092
Carbon / Stillwater Community Senior Programs	Information & Assistance Senior Health Insurance Prog. Ombudsman Program In Home-Respite Care Services Supplemental Commodity Food Program Options Counseling Program Focal Point	Susan Lewis – Director 406-962-3800
Cedar Wood Villa 1 South Oaks Avenue Red Lodge, MT 59068	Congregate Meals Home Delivered Meals	Margaret Schwend- Administrator 406-446-2525
Joliet XYZ'ers P.O. Box 354 Joliet, MT 59041	Congregate Meals Home Delivered Meals Senior Citizens Center Health Screenings Focal Point	Denise Nafts - President 406-962-9827
Red Lodge Senior Citizens Ctr 207 So. Villard P.O. Box 1293 Red Lodge, MT 59068	Congregate Meals Home Delivered Meals Transportation Senior Center Health Screenings Foot Clinics Focal Point	Louise Jenkins-President 406-696-2676

Valley Senior Citizens P.O. Box 88 Fromberg, MT 59029	Congregate Meals Home Delivered Meals Health Screening Focal Point	Bill Rivers-President 406-668-7613
Big Sky Senior Services 937 Grand Avenue Billings, MT 59101	In Home Services –Carbon County	Denise Armstrong-Director 406-259-3111

Fergus County

Provider name/address: List services provided Contact Information

Fergus County Council Aging 305 W. Watson Lewistown, MT	Congregate Meals Home Delivered Meals Senior Citizens Center Transportation Homemaking Services Respite Services Health Screenings Foot Clinic Senior Health Insurance Program Information & Assistance Ombudsman Program Options Counseling Program Senior Medicare Patrol Supplemental Commodity Food Program Focal Point	Susan Lear – Director 406-535-7486
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Golden Valley County

Provider name/address: List services provided Contact Information

Golden Valley Senior Citizens P.O. Box 235 Ryegate, MT 59074	Congregate Meals Home Delivered Meals Senior Citizens Center Health Screenings Focal Point	Aileen Mattheis-President 406-568-2340
Lavina Senior Citizens Center	Congregate Meals Home Delivered meals Senior Citizens Center Health Screenings Focal Point	Diana Richards-Director 406-568-2074

Judith Basin County

Provider name/address: List services provided Contact Information

Geyser-Raynesford Senior Citizens Center Geyser MT 59447	Congregate Meals Home Delivered Meals Senior Citizens Center Homemaker Services Respite Services Focal Point	Jack O'Connor-President 406-738-4373
Judith Basin Senior Citizens Center P.O. Box 8 Stanford, MT 59479	Congregate Meals Home Delivered Meals Senior Citizens Center Focal Point	Willard Tonne-President 406-566-2739
Judith River Senior Citizens Center P.O. Box 404 Hobson, MT 59452	Congregate Meals Home Delivered Meals Senior Citizens Center Health Screening Focal Point	Sharon Killham-President 406-423-5335

Musselshell County

Provider name/address: List services provided Contact Information

Musselshell County Council on Aging 26 Main Street Roundup, MT 59072	Congregate Meals Home Delivered Meals Homemaking Services Respite Services Transportation Senior Citizens Center Focal Point	Rose Martin-Director 406-323-2015
Musselshell County Food Bank 101 2 nd Street East Roundup, MT 59072	Supplemental Commodity Food Program for Musselshell/Golden Valley & Wheatland Counties	Barb Wacker 406-861-4762
Roundup Memorial Health Care 1202 3 rd Street West	Congregate Meals Home Delivered Meals	Brad Howell-Administrator 406-323-2301
Retired Senior Volunteer Program 315 ½ Main Street Roundup, MT 59072	Volunteer Opportunities for Musselshell/Fergus/Golden Valley/Judith Basin & Petroleum Counties	Shirley Brillhardt-Director 406-323-1403

Petroleum County

Provider name/address: List services provided Contact Information

Petroleum County Senior Center P.O. Box 93 Winnett, MT 59087	Congregate Meals Home Delivered Meals Homemaker Program Respite Care Program Health Screenings Senior Citizens Center Focal Point	Linda Gershmel-President 406-429-5511
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Stillwater County

Provider name/address: List services provided Contact Information

Columbus Senior Citizens Ctr. P.O. Box 655 Columbus, MT 59019	Congregate Meals Home Delivered Meals Senior Citizens Center Focal Point	Una Kay Decock-President 322-5797
Park City Senior Citizens Ctr. P.O. Box 697 Park City, MT 59063	Congregate Meals Home Delivered Meals Health Screening Senior Citizens Center Focal Point	Sandy Gillitzer-President 406-633-9833
Rapelje Senior Citizens P.O. Box 101 Rapelje, MT 59067	Congregate Meals Home Delivered Meals Senior Citizens Center Focal Point	Mariah Weiler-Treasurer 406-663-2141
Reed Point Senior Dinner Program Reed Point High School Reed point, MT 59069	Congregate Meals	Melisa Bartelt-Business Manager 406-326-2245
Stillwater Senior Citizens Ctr. P.O. Box 92 Absarokee, MT 59001	Congregate Meals Home Delivered Meals Senior Citizens Center Focal Point	Gerry Anderson-President 406-328-7363
Carbon / Stillwater Community Senior Programs	Information & Assistance Senior Health Insurance Prog. Ombudsman Program In Home-Respite Care Services Supplemental Commodity Food Program Options Counseling Program Focal Point	Susan Lewis – Director 406-962-3800

Sweetgrass County

Provider name/address: List services provided Contact Information

Hearts & Hands Hospice P.O. Box 603 Big Timber, MT 59011	Supplemental Commodity Food Program	Pam Braaten 406-932-4587
Hospitality House P.O. Box 298 Big Timber, MT 59011	Congregate Meals Home Delivered Meals Transportation Senior Citizens Center Health Screening Homemaker program Respite Program Focal Point	Ursula Ostneberg-Director 406-932-5455
Pioneer Medical Center P.O. Box 1228 Big Timber, MT 59011	Congregate Meals Home Delivered Meals	Eric Wood Administrator 406-932-4603

Wheatland County

Provider name/address: List services provided Contact Information

Wheatland County Senior Citizens P.O. Box 515 Harlowton, MT 59036	Congregate Meals Home Delivered Meals Senior Citizens Center Transportation Commodity Supplemental Food Program Focal Point	Mel Holman-Director 406-860-7843
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Yellowstone County

Provider name/address: List services provided Contact Information

<p>Adult Resource Alliance of Yellowstone County 1505 Avenue D Billings, MT 59102</p>	<p>Congregate Meals Home Delivered Meals Senior Citizens Centers Transportation Health Screenings Senior Medicare Patrol Volunteer Program Minor Home Repair Program Health Promotion Senior Trips Program Focal Point</p>	<p>Bea Ann Melichar- Director 406-259-9666</p>
<p>Aging & Disability Resource Center Adult Resource Alliance of Yellowstone County 1505 Avenue D Billings, MT 59102</p>	<p>Information & Assistance Prg. Senior Health Insurance Prg. Reverse Annuity Mortgage Options Counseling Program Caregiver Support Program Senior Medicare Patrol Focal Point</p>	<p>Sue Baily-Program Director 406-259-9666</p>
<p>Big Sky Senior Services 937 Grand Avenue Billings, MT 59101</p>	<p>Homemaker Services Personal Care / Respite Serv. Information & Assistance Telephone Friends Program Prevention of Elder Abuse Representative Payee Prg. Yellowstone Guardianship Prg Focal Point</p>	<p>Denise Armstrong- Director 406-259-3111</p>
<p>Billings Food Bank 2112 4th Avenue N. Billings, MT 59101</p>	<p>Supplemental Commodity Food Program for Yellowstone/Fergus/ Carbon Counties</p>	<p>Sheryl Shandy – Director 406-259-2856</p>
<p>Broadview Senior Citizens Center P.O. Box 44 Broadview, MT 59015</p>	<p>Congregate Meals Home Delivered Meals Senior Citizens Center Homemaker Program Respite Care Program Focal Point</p>	<p>Art Reintsma-President 406-667-2121</p>
<p>Prairie Tower 725 N, 25th Street Billings, MT 59101</p>	<p>Congregate Meals</p>	<p>Teresa Wolff-Program Manager 406-245-8007</p>
<p>Sage Towers 115 N. 24th Street Billings, MT 59101</p>	<p>Congregate Meals</p>	<p>Karen Ammon- Program Manager 406-861-4084</p>

Crow Tribe

Provider name/address: List services provided Contact Information

Crow Agency Elders Program P.O. Box 542 Crow Agency, MT 59022	Congregate Meals Transportation Health Screening Home Delivered Meals Senior Citizens Center Information & Assistance Focal Point	Mary Jane Birdinground – Director 406-638-4449
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Northern Cheyenne Tribe

Provider name/address: List services provided Contact Information

Northern Cheyenne Elders P.O. Box 470 Lame Deer, MT 59043	Congregate Meals Home Delivered Meals Health Screening Transportation Senior Center Supplemental Commodity Food Program Focal Point	Roberta BigBack-Director 406-477-8707
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Area II Agency on Aging Location & Contact Information

1502 4th Street West
 P.O. Box 127
 Roundup, MT 59072
 406-323-1320
 Fax: 406-323-3859

Area II Agency on Aging Program and Staff

Name	Program(S)
Todd Wood	Area Director
Marcy Brookie	Fiscal Administrator
Gerri DeLeo	I&A,SHIP, SMP, Commodities, Options Counseling Coordinator
Karen King	Guardianship, I&A, SHIP, Self-Directed PAS Veterans Directed HCBS, Support Specialist
Linda Hendricks	Guardianship, I&A, SHIP, Support Specialist
Jean Olson	Representative Payee Coordinator, Self-Directed PAS
Brenda Plagyi	Branch Accounting, I&A, SHIP, Support Specialist
Anne Rose	Self-Directed PAS, Veterans Directed HCBS Coordinator
Susie Goffena	Home & Community Based Services-SW
Lorraine Steele	Home & Community Based Services-LPN
Laura Goffena	Home & Community Based Services– SW
Jaimie White	Home & Community Based Services - LPN
Kathy Chaffee	Ombudsman – Regional Coordinator
Christi Shults	Ombudsman Program – Local Ombudsman
Tammy Schissler	Ombudsman Program – Local Ombudsman
Linda Bainter	Ombudsman Program-Local Ombudsman
3	Volunteer Ombudsman / Friendly Visitor Staff
45	Self-Directed Personal Care Attendants

ATTACHMENT F

REQUEST FOR WAIVERS

The following is a list of each service and funding source for which a waiver to provide direct services is being requested, the reason for requesting the waiver, and the time period to be covered by the waiver.

Area II Agency on Aging hereby requests a waiver for the delivery of the following services to individuals in our planning and service area.

Case Management Services through Home & Community Based Services of the Community Services Bureau, Senior & Long Term Care Division.

Self-Directed Personal Care Services through Senior & Long Term Care Division.

Veteran's Directed Home & Community Based Services through the Veteran's Administration.

All three listed services are person centered programs offering individual choice for participation. They offer the option of necessary services to individuals in our service area that are either not available or are of comparable quality to similar programs. All programs operate with the goal of assisting the individuals who choose to participate with services to promote independence and avoid institutional care.

This request for waiver is for the period **October 1, 2015 to September 30, 2019.**

Todd Wood, Director, Area II Agency on Aging

Date: 03/20/2015

Kelly Gebhardt, Governing Board Chairman,
Area II Agency on Aging

Date: 03/20/2015