

Heritage Area Agency on Aging PSA 4

SFY 2026 - 2029 Area Plan on Aging



Plan Effective Dates: July 1, 2025 – June 30, 2029

Table of Contents

EXECUTIVE SUMMARY.....	4
CONTEXT	ERROR! BOOKMARK NOT DEFINED.
SECTION 1: GOALS, OBJECTIVES, STRATEGIES & MEASURES	9
Goal 1: Maximize Independence.....	9
Goal 2: Improve Health and Wellness	23
Goal 3: Improve Safety and Quality of Life	39
Goal 4: Stay Engaged and Supported	55
SECTION 2: SERVICE PROJECTIONS	69
SFY 2026 Projected Consumers and Service Units	69
SFY 2026 Service Coverage	71
Self-Direction Service Delivery.....	73
Caregiver Respite Voucher.....	74
Evidence-Based Programming (EBP)	75
Area Plan Service Waiting List	76
Title III and Title VI Coordination and Tribal Elders and Family Caregivers Outreach Activities.....	77
SECTION 3: QUALITY MANAGEMENT	78
SECTION 4: PUBLIC INPUT	80
Public Hearing Information.....	84
Governing Body	129
Advisory Council	131
ATTACHMENTS	135
Authorized Signatures	136

Grievance Procedures	138
Staffing and Volunteer Information	141
Nutrition Services, Service Providers, and Senior Center/ Focal Points	142
Emergency Plan and Plan Development Summary	145
Direct Service Requests	155
Cost Allocation Plan	156
SFY2026 Estimated Funds Distribution to Prioritized Populations	156
Funds Transfer Request	158
“Grab and Go” Meals	158

Executive Summary

For over 50 years, Heritage Area Agency on Aging has had a presence in Cedar Rapids and surrounding communities, as well as a partnership with Kirkwood Community College (KCC). Now a 501(c)3, Heritage remains on the KCC campus and benefits from their infrastructure support. With a strong history of working alongside and partnering with other entities in our region, our philosophy of service is to engage and empower existing community agencies to encourage the growth of a robust network of providers. Despite our strong network, however, outreach and referrals from our rural communities has been increasingly difficult. This Area Plan will address the need for access for all, and the continued need for strong provider/AAA relationships.

Goal 1 – Maximize Independence. Heritage is committed to ensuring people with disabilities and older adults have access to person-centered services that maximize their independence, self-sufficiency and ability to age in place. Some rural communities have low ADRC participation despite active nutrition and transportation programs, primarily due to limited numbers of providers in those counties. During this Area Plan term, Heritage will reach out to new ADRC sister agencies, Disability Access Points, the new ADRC call center and subcontractors to engage and inform them, coordinate ADRC expansion, and increase referrals to Heritage.

Case management and IRTC (Iowa Return to Community) support older adults to age in place, and both are experiencing increased eligible individuals and flat funding. Case management enrollment increases year over year. Even with an increase of .5 FTE staff in 2022, the program is at capacity. With limited funding, prioritization and wait lists will be necessary; we will focus on rural counties with lowest participation and participants with greatest Activity of Daily Living (ADL) limitations. Similarly, IRTC supports individuals transitioning from a health facility to home, ensuring successful discharge and independence after a health change. This service should be expanded beyond Linn County, however limited staffing and funding is a barrier. Heritage will evaluate and modify the referral process and consider expansion to another rural county as feasible.

Goal 2 – Improve Health and Wellness Heritage provides congregate dining and subcontracts with six service providers to offer congregate dining and home delivered meals. While we have OAA nutrition programs in every county, as well as some privately funded sites, there are some areas in need of service. Heritage will partner with community leaders and identify pockets of greatest need for meal site additions. This will impact a flat-funded budget. Continued service utilization review will evaluate all locations for consumer needs and adjust as indicated; however, wait lists will be necessary. To provide additional support, Heritage will continue to host food distributions with the support of business food donations and food pantries. In addition to Heritage staff, we will invite other service providers to be present and offer support services to

participants to provide a “one stop shop.” Heritage will continue to use nutrition programming and food distributions as one venue to screen for malnutrition and develop meaningful interventions within our Malnutrition Pilot Program.

Goal 3 – Improve Safety and Quality of Life Heritage has a rich network of provider partners to address elder abuse prevention and awareness (EAPA), yet some areas of the region still experience a lower EAPA service referral rate. Heritage will continue to build on existing relationships to increase awareness, including working with Clerks of Court, County Resource Meetings, banks, libraries, etc. Heritage will leverage our relationship with local legal aid practitioners to present at our events and assess the effectiveness through pre- and post-testing.

Planning for emergencies and severe weather is imperative to older adults’ ability to remain safe. Heritage currently has an AmeriCorps member through the University of Iowa offering the PrepWise curriculum to older adults in our region. We also work closely with Linn County Emergency Management to register older adults for Alert Iowa. Heritage will continue to train and prepare users of our services, as well as provide information and support to our Disability Access Points, ADRC partners and subcontractors to also offer these programs to their consumers.

Goal 4 – Stay Engaged and Supported As with other services, our Caregiver Support Program is not as frequently utilized in rural areas of the region. Heritage will focus on outreach to caregivers and work with rural subcontractors to support referrals. Heritage staff often attend congregate meals and will continue doing so to provide an extra point of contact with prospective caregiver consumers. We will also implement validated screening tools to better identify informal caregivers experiencing or at risk for stress, depression or financial cost burden. In turn, the process will better inform our prioritization, wait lists and management of staff caseloads.

Dementia has become a significant public health concern as well as a significant challenge to caregivers. We have used Powerful Tools for Caregivers to provide caregiver education; however, the response to the program has been lukewarm. Heritage will assess the program and implement another caregiver program as needed. In addition, we will work with our ADRC partners, subcontractors, other community providers and agencies/businesses to expand community understanding of dementia and related disorders through the Dementia Friends program.

Heritage’s focus throughout the term of this Area Plan will be in response to the Community Needs Assessment and other data points. We will direct services to support older adults and people with disabilities in overcoming barriers, particularly experienced by individuals in areas with lower rate of service participation. Our focus will also be to support access for all during a time of growing need and limited resources.

Context

Heritage Area Agency on Aging developed its Community Needs Assessment by reviewing past agency Assessments and examples provided by the Iowa Department of Health and Human Services, Aging and Disability Services Division (HHS, ADS). Components from each were combined and modified to create a five-part survey: Respondent Demographics; Individual Needs, related to general aging challenges; Family Caregiving, related to caregiving duties and challenges; Community Needs, related to perception of services in the wider community; and a Contact Form to generate referrals.

The Assessment was conducted with paper copies and online with Google Forms from June 1, 2024 – August 15, 2024. Online surveys were shared on social media, the Heritage website and by Heritage staff with their professional connections. Hard copy surveys were distributed and collected by the Heritage Board of Directors, the Advisory Council, dining sites, community centers, low-income senior apartments, churches, public health departments and staff both personally and at outreach events.

Heritage received 262 completed responses: 197 hard copies and 65 online. Of the 262 responses, 198 were from older Iowans age 60 and older. Using a sample size calculator suggested by HHS staff, Heritage estimates an 80-85 percent confidence level in the representativeness of survey results applied to older Iowans (margin of error 5 percent). Of the 262 responses, 101 self-reported their status as a caregiver. Using the sample size calculator and AARP estimates of caregivers in the Heritage region, Heritage estimates a 65-70 percent confidence level in the representativeness of survey results applied to caregivers (margin of error 5 percent).

To solicit further feedback, Heritage hosted two public hearing and provided opportunity to submit written comment in lieu of attending a hearing. Hearings were hosted via Zoom and at the Heritage office on January 6, 2025. Five attendees joined the Zoom hearing, three attendees joined the in-person hearing and four people submitted written comments. Meeting minutes of the public hearings are included in Section 4 of this Area Plan.

Data collected from the Community Needs Assessment guided Heritage in identifying priority consumer groups and concerns to address in the Area Plan. Themes of isolation, lack of access to healthcare and services, financial worries and maintaining physical health were prevalent. Among respondents, 41 percent reported living alone and 21 percent said they do not have money to pay for regular expenses (food, medications, bills, etc.) after paying for their housing. When asked what issues may present challenges to their successful aging, the below proportions of respondents helped inform Heritage's priorities:

Barrier to Successful Aging	Percent of Respondents
Loneliness/isolation	29.8 %
Lack of involvement	26.3 %
Access to healthcare	35.5 %
Access to transportation	29.8 %
Affordable medications	47.7 %
Sufficient income for retirement	41.6 %
Cost of food	41.2 %
Maintaining diet and/or exercise	48.5 %
Vision and/or hearing impairment	44.3 %
Providing care for another person	33.2 %

While the standout populations and issues were not necessarily surprising, their confirmation provided a strong basis for selecting the Goals and Objectives in the Area Plan. They also point toward a continued need to serve older lowans with the greatest economic and social need:

- When asked about a variety of potential barriers to their own successful aging, 71.7 percent of respondents chose at least one of the four financial concerns presented: affordable medications, limited income, cost of food and sufficient income for retirement. This percentage translates to more than 74,000 older lowans across the Heritage AAA region.
- A significant proportion of the service area’s older adult population living alone or experiencing isolation poses great health risks associated with social isolation: high blood pressure, cognitive decline, Alzheimer’s disease and more (source: National Institute of Health, 2019).

The need for healthcare and reasonable means of accessing it were also prevalent themes from the survey data. When asked to identify the top three concerns respondents had about their future ability to live independently, the top three answers included Declining Health Conditions (50.4%), Accessing Health Care (45.4%) and Finances (38.9%). All other options were selected by less than one-third of respondents. The data showed greater concerns among the more rural counties in Heritage’s service area, emphasizing the need to continue focusing efforts on underserved communities.

County Of Residence	Pct. Respondents Selecting Healthcare Access	Pct. Respondents Selecting Declining Health Conditions
Benton	62.1	51.7
Cedar	42.1	52.6
Iowa	38.8	51.6
Jones	53.8	61.5
Washington	44.4	44.4
Combined	48.2	51.8

Linn	44.0	51.2
Johnson	37.5	25.0
Combined	43.3	48.2
Difference	+ 4.9 rural	+ 3.6 rural

The outlined data above and more from the Community Needs Assessment and U.S. Census guided Heritage toward selecting the Objectives and Strategies within the four broader goals, as well as priority populations to serve. With these determined, Heritage presented the Area Plan to its Advisory Council for consideration at the end of February 2025. The Council unanimously approved the Plan and moved it forward to the Heritage Board of Directors, which also unanimously approved at its April 2025 meeting. Both bodies were advised of continuing opportunities for input via written comment and future Area Plan Updates.

Section 1: Goals, Objectives, Strategies & Measures

Goal 1: Maximize Independence

People with disabilities and older adults have access to high quality, equitable, and person-centered services that maximizes their independence, community integration, and self-sufficiency.

Agency Programs, Services & Initiatives

The Heritage community needs assessment demonstrates Heritage has gaps in rural areas related to services described below. Heritage would like to improve outreach to better meet the needs and reach our gap areas to ensure eligible individuals with the most social and economic need are aware of and access Older American Act (OAA) services. We also need to build staff capacity to have all services available when new consumer needs are identified. Insufficient funding is the primary reason for not increasing staff capacity at this time.

Nutrition services are an entry point for service expansion. The care team and nutrition team work jointly at community food distributions and Encore Café locations: Options Counselors, Case Managers or Elder Rights Specialists are present at every food distribution to answer questions about community resources. This best practice has led to information & assistance calls, new family caregiver clients, elder abuse inquiries and more. This multi-team approach brings staff to where the people are so they don't have to seek assistance on their own.

Heritage's reach is applied at our highest level of volunteer leadership, with each county Board of Supervisors represented by a member or designee. These Board members become champions of our agency at the local level and provide Heritage with insight on their communities.

Heritage offers all care program services in a Person-Centered model of service. Our work is led by consumers' goals and not what staff think is best or most convenient. This model empowers consumers to choose services and providers while maintaining independence in the home setting of their choice. When a consumer needs to make a difficult but necessary decision for their health and wellness, Heritage staff provide them with unbiased, comprehensive and quality information to empower their choice. Care team staff will attend the "Person Centered, Trauma-Informed Essentials for Aging Services" training provided by the Jewish Federation of North America's Center on Aging. This free, online training is 6 hours of content offered in a flexible and self-paced manner. It includes expert interviews, exercises and provides five hours of social work CEUs.

Individuals in the Iowa Return to Community (IRTC) program have a high risk of rehospitalization and are at high risk of requiring long-term care placement. IRTC's ultimate goal is to prevent readmissions and the associated costs to the individual, State

and health systems. Heritage works closely with our partner, Mercy Medical Center in Cedar Rapids, to encourage appropriate referrals.

Current trends

- A comprehensive outreach plan for the agency is described in this goal. However, many of the rural counties have limited local service providers, thus comprehensive service delivery is more challenging.
- Services can be hard to understand for eligible individuals and changes in public systems at the state and federal level – such as with Medicaid – can make it even more challenging for individuals to understand if they are eligible. Many may choose not to pursue what they could access through OAA.
- Heritage case management case loads are often at capacity or only have slight room for new consumers. Heritage has identified that year-over-year use of the service continues to grow. Case management is a successful program with excellent outcomes with people participating for a long time. Added capacity to serve even more individuals is needed to meet short-term and long-term projections.
- Partnerships will become ever more important as the older adult population grows every year. Heritage will need these partnerships to help reach eligible older adults and meet their needs during times of flat funding and increased eligible population.
- IRTC has been beneficial to those enrolled, which are typically older adults that need additional support while transitioning home from the hospital or a nursing facility. However, we need to explore the option of expanding this service into a rural area. Current referrals are primarily from Linn County and we want to reach more areas of our region with this service. The capacity of current staffing will need to be factored in with such an expansion.
- Heritage has seen about a 50% refusal rate into the IRTC program. Heritage is researching potential causes such as inappropriate referrals, consumers' knowledge of the program or insufficient promotion of the program's benefits.
- Heritage is seeking co-location of a partner agency to assist in services for seniors and adults with disabilities. Possible colocations in the region may include APS workers, disability organizations and other organizations serving similar populations.

Heritage's consumer needs are greater than Heritage can address on our own. Partnerships are essential to address the needs of the region in a comprehensive manner. Heritage works with subcontractors to provide home delivered meals, congregate meals, assisted transportation, transportation, in-home respite, facility-based respite, adult day care, and chore. Subcontractors are identified through a competitive RFP (Request for Proposal) process. In addition, Heritage works with providers in the areas of emergency response systems, material aid and more. These needs are identified through the care planning process with consumers. For example, when an older adult determines one of their goals is to explore obtaining an emergency

response system, Heritage staff will assist the consumer to find available options in their area, pricing, funding sources and assist with setting up the service.

Heritage also has relationships with local law enforcement entities, mental health liaisons, area hospitals, and county governments. These partners often refer potential consumers to Heritage for assistance.

Typical consumer: Typical case management consumers are ages 65 to 84 years old (74%), White (92%), female (62%), live alone (80%) and have a high nutrition risk score (70%). Heritage subcontracts with our local service area partners to provide a variety of home and community-based service options that keep persons age 60 and older healthy, independent, safe and living within their community of choice. Listed below are home and community-based services provided in FY2024 by Heritage and our funded partners.

- **Adult day care** – 27 consumers received 7,420 hours of service.
- **Assisted transportation** – 84 consumers received 959 rides.
- **Case management** – 74 consumers received 1,202 hours of services.
- **Chore service** – 105 consumers received 3,961 units of service.
- **Emergency response systems** – 24 consumers received 163 units of service.
- **Information & assistance** – 1,340 consumers received 3,105 units of service.
- **Material aid: consumable supplies** – 375 consumers received 5,981 units of service.
- **Material aid: other** – 80 consumers received 286 units of service.
- **Transportation** – 191 consumers received 3,491 rides.

Typical caregiver case management consumers in FY2024 who needed long-term support were 60 years of age or older (100%), White (81%) and female (74%). Heritage also provides a variety of informal caregiver supports. Listed below are services provided to caregivers in FY2024 by Heritage and funded partners.

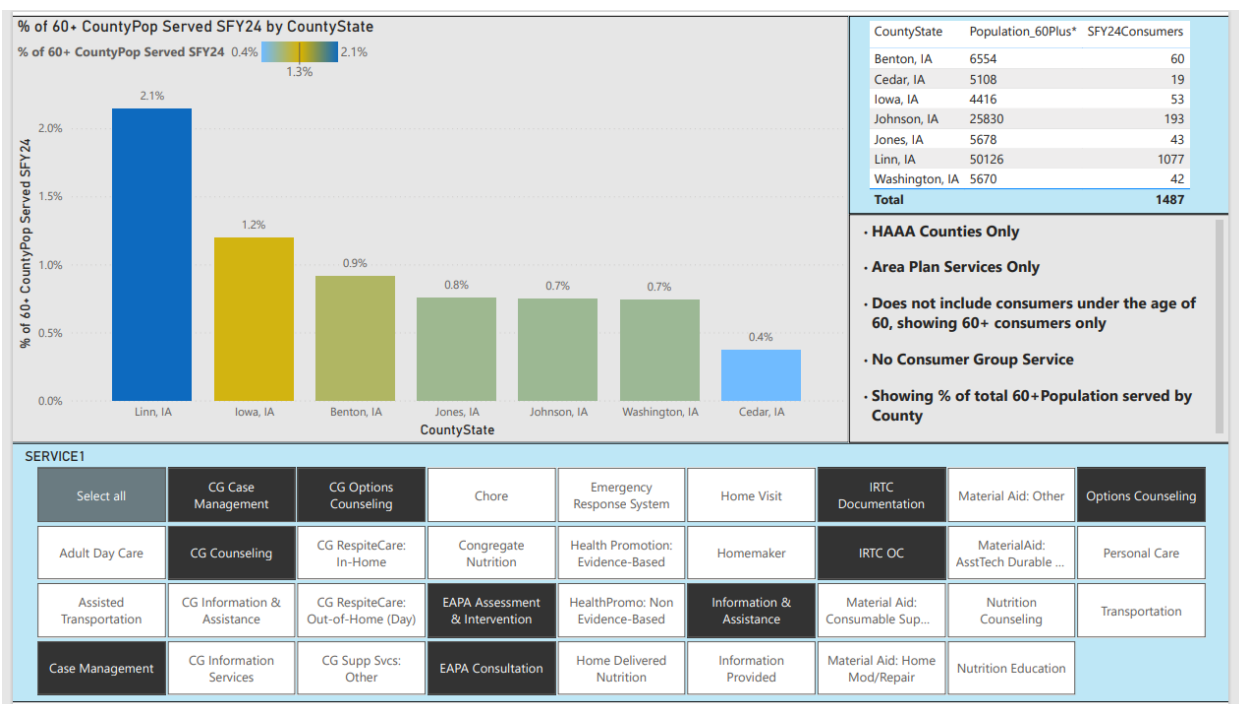
- **Caregiver case management** – 27 consumers received 290 hours of service.
- **Caregiver counseling** – 11 consumers received 21 units of service.
- **Caregiver respite care: in-home** – 113 consumers received 6,757 hours of service.
- **Caregiver respite care: out-of-home** – 23 consumers received 5,300 hours of service.
- **Caregiver supplemental services** – 20 consumers received 437 unit of service.

Objective 1: 1.1 - Expand Aging & Disability Resource Center (ADRC) / No Wrong Door (NWD) partnerships to improve coordination of services for older adults and people with disabilities.

Why it matters...

Heritage's desired outcome is to further our relationships at the county level to increase information and assistance (I&A) calls from focus areas. This will increase access to OAA services, empowering older adults and adults with disabilities to live in their home setting of choice and prevent premature institutionalization.

Comprehensive services are key to maximizing independence for seniors and adults with disabilities. Services should be person centered, accessible and sensitive to financial barriers. Services using this approach are less available in rural areas of our region. The tables below demonstrate areas of most need. Our focus area counties have particularly low ADRC service participation despite having active congregate dining sites, transportation, in-home respite, and home delivered meals (HDM) services.



The chart above shows the percent of 60+ population Heritage served in SFY24 by county, applied to the services in the black boxes.

Poverty60+ConsumersSFY24

BY CNTYPOP_POVERTY_60PLUS*, COUNTYSTATE, CNTY60+POVERTY%SERVED

CountyState	CNTYPop_Poverty_60Plus*	Poverty60+ConsumersSFY24	CNTY60+Poverty%Served
Linn, IA	3141	819	26.07%
Jones, IA	310	78	25.16%
Iowa, IA	320	73	22.81%
Cedar, IA	337	56	16.62%
Johnson, IA	1600	203	12.69%
Washington, IA	299	24	8.03%
Benton, IA	680	46	6.76%
Total		1299	

The chart above shows:

Column 1: Number of 60+ people living in poverty by county.

Column 2: Number of 60+ people served by Heritage in SFY24 living in poverty by county.

Column 3: Percentage of 60+ people served by Heritage in SFY24 living in poverty by county.

LivesAlone65+ConsumersSFY24

BY COUNTYSTATE, CNTYPOP_LIVINGALONE_65+, CNTY65+LIVESALONE%SERVED

CountyState	CNTYPop_LivingAlone_65+	LivesAlone65+ConsumersSFY24	CNTY65+LivesAlone%Served
Jones, IA	308	166	53.90%
Cedar, IA	307	156	50.81%
Linn, IA	2816	1385	49.18%
Iowa, IA	266	119	44.74%
Johnson, IA	1016	254	25.00%
Benton, IA	385	83	21.56%
Washington, IA	388	76	19.59%
Total		2239	

The table above shows:

Column 1: Number of 65+ people living alone by county.

Column 2: Number of 65+ people served by Heritage in SFY24 living alone by county.

Column 3: Percentage of 65+ people served by Heritage in SFY24 living alone by county.

What we are doing...

Strategy: 1.1a - Develop and/or strengthen partnerships with other agencies to increase referrals of populations/areas in greatest need to OAA services.

- Explanation of Other Strategy (if selected):

n/a

Activities:

1. Heritage will create a monthly calendar with planned outreach activities to partners to increase referrals.
2. Heritage will reach out to all new ADRC and behavioral health partners in our region to explain our services and how to make a referral. Heritage will welcome new partners, offer assistance to sister ADRC agencies and encourage involvement in the University of Iowa Center for Disability & Development's efforts.
3. Heritage will reconsider how Trigger Sheets – with provide subcontractors with referral best practices – are written and if they should be revised.
4. Heritage will continue to provide outreach kits to all subcontractors during their annual contract monitoring visit.
5. Heritage will develop a survey for subcontractors regarding the ease of making a referral and how we could improve this process or materials.
6. Heritage will update materials and/or processes based on feedback from subcontractors.
7. Heritage will Care Team members will continue attending dining sites and will offer a presentation on services available from Heritage.
8. Heritage will offer such presentations with new partners at their staff trainings or meetings.
9. Heritage will expand access by adjusting communication tools and methods including: modernized website accessibility, recording more trainings and events, and seeking the translation of more Heritage materials to meet the needs of our community. Such access strategies will be communicated and shared with all current and new partners.
10. Heritage will continue staff trainings to ensure we are offering high quality services to our consumers and partners.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected):

n/a

Populations in Greatest Social Need: Persons ages 60+ who are living alone

- Explanation of Other or Sub Population (if selected):

n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

n/a

- Explanation of Other or Sub Population (if selected.):

n/a

Area(s) of Focus:

Heritage region with particular attention paid to Benton, Cedar, Iowa, Jones, and Washington counties based upon data showing gaps exist in these areas.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 1.1 - #/% of populations/area(s) in greatest need consumers receiving Information and Assistance. #2: [Choose an item.] #3: [Choose an item.]	#1: 1.1 - #/% of populations/areas in greatest need consumers who indicate they received the information they were seeking. #2: [Choose an item.] #3: [Choose an item.]	#1: 1.1 - #/% of populations/areas in greatest need who received Information and Assistance and are also enrolled in at least one additional OAA service. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: 10% increase in calls from FY25 to FY26 in Benton, Cedar, Iowa, Jones and Washington counties. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 85% response rate from callers in Benton, Cedar, Iowa, Jones and Washington counties in FY26. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 50% of NEW I&A callers from Benton, Cedar, Iowa, Jones and Washington counties are enrolled in another OAA service in FY26. #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure(s) (if selected):

n/a

- Explanation of logic used to develop SFY 2026 targets:

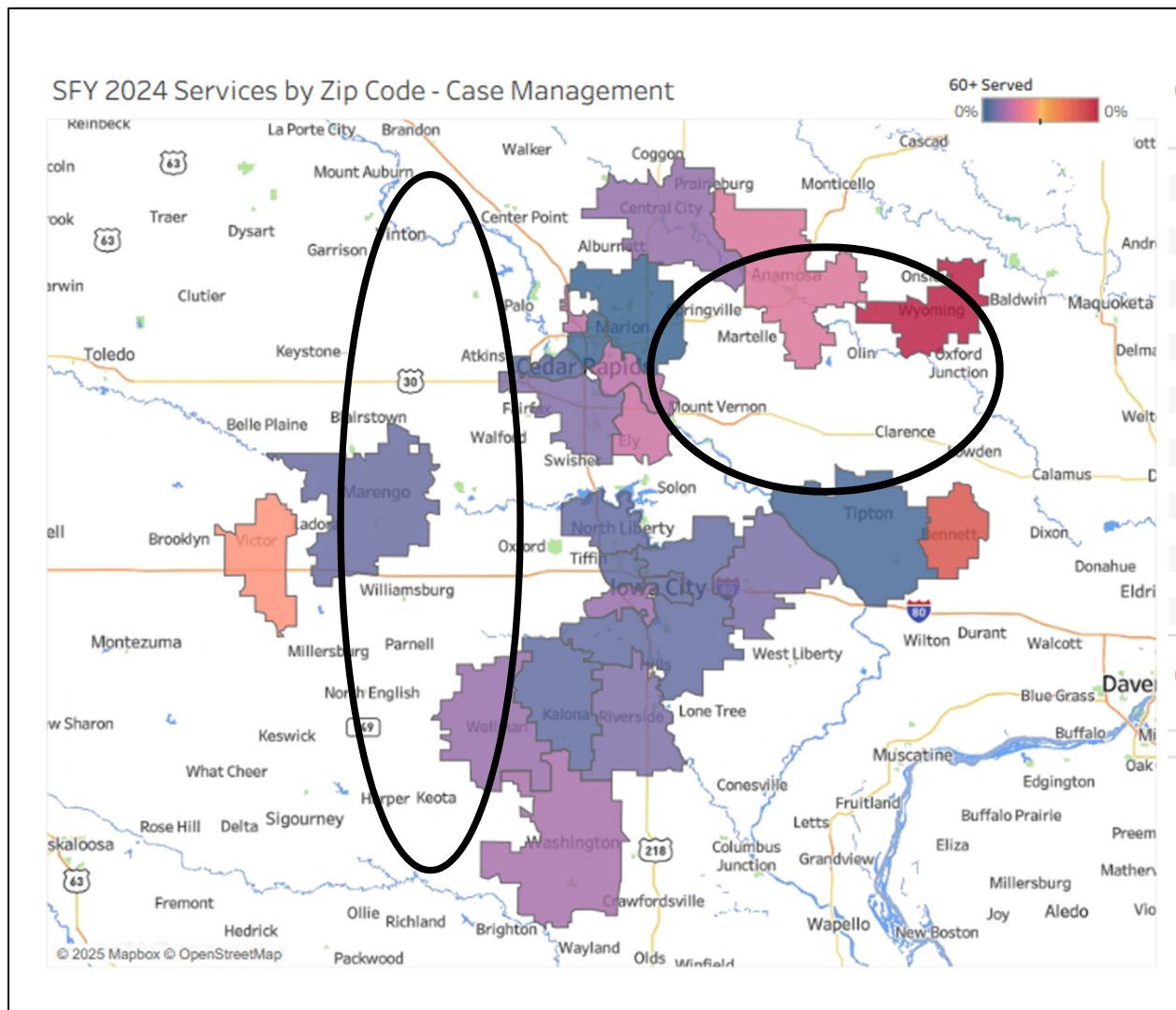
The targets above are based on FY25 current usage, planned activities and anticipated results.

Objective #2: 1.3 - Develop a high quality, equitable, comprehensive, and coordinated system of long-term care that enables people with disabilities and older adults to receive long-term care in community-based settings.

Why it matters...

Heritage's desired outcome is to increase capacity in the case management program for eligible individuals with the most economic and social needs, empowering their inability to live independently in their home setting of choice.

The first chart below represents the gap areas of case management services in Iowa, Cedar and Washington counties.



Click or tap here to enter text.

What we are doing...

Strategy: 1.3d - Provide Case Management to increase the capacity of individuals to live independently within their community of choice.

- Explanation of Other Strategy (if selected):
n/a

Activities:

1. Integrated Service Director (ISD) will develop a prioritization method to ensure all people currently receiving case management are utilizing the program as intended and meet the target population.
2. ISD will work with Heritage's fiscal department to determine what funding goals need to be achieved to be able to bring another Case Manager to the team.
3. ISD will work with Heritage management to determine what action needs to be taken to meet identified financial goals to expand the staff.
4. ISD will re-evaluate our current care team staffing model and consider if it should transition to a county-based vs. program-based assignment model. If the current model is preventing care team program expansion and change would increase case management capacity, a transition plan and timeline will be established by the end of FY26.
5. If ISD is unable to increase case management program capacity through actions above, a Wait List process will be implemented.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons with a status that: a) limits their ability to perform ADLs/IADLs or b) threatens the capacity of the individual to live independently

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Heritage will focus on consumers in the rural counties of Iowa, Cedar, and Washington with ADL/IADL limitations based on current data.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 1.3 - #/% of populations/area(s) in greatest need consumers receiving Case Management. #2: [Choose an item.] #3: [Choose an item.]	#1: 1.3 - Other % of increase in Case Management enrollment in underserved area in focus area of Cedar County. #2: [Choose an item.] #3: [Choose an item.]	#1: 1.3 - #/% of populations/areas in greatest need who identified as having one or more ADLs/IADLs during intake for Case Management and are now receiving community-based services. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: Increase individuals served by 5 total for Iowa, Cedar, and Washington counties with greatest need in Case Management. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Increase individuals served in Case Management by 3 in Cedar County. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Increase Case Management consumers with greatest need also receiving other OAA services by 10% in Iowa, Cedar and Washington counties. #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure(s) (if selected):
n/a

- Explanation of logic used to develop SFY 2026 targets:
The targets above are based on FY25 current usage, planned activities and anticipated results.

Objective #3: 1.5 - Increase community integration of older adults and people with disabilities through care transition supports from health facilities to community of choice.

Why it matters...

Heritage's desired outcome is to expand the Iowa Return to Community (IRTC) program reach within capacity limitations and as the budget allows.

IRTC Partnership with Mercy Medical Center FY2024

	Total
Consumers Referred	150
Consumers Admitted	50
Consumer Discharged	32

Through December of FY25, all IRTC consumers have been residents of Linn County with the exception of one resident of Benton County.

FY2025

	Total
Consumers Referred	53
Consumers Admitted	21
Consumer Discharged	3

What we are doing...

Strategy: 1.5d - Provide Iowa Return to Community Options Counseling to persons transitioning from a health care facility into a less restrictive environment.

- Explanation of Other Strategy (if selected):
n/a

Activities:

1. Develop a survey for IRTC referrals that choose not to enroll to understand their reason(s) for declining. Heritage currently has a 50% admission rate of those that are referred.
2. Assess admission process into IRTC to determine why there is a 50% refusal to participate. Based upon feedback, make changes to our initial contacts with older adults that are referred to the program.
3. Hospital social workers who make referrals were surveyed in FY25. We will look at those results closer in FY26 and give consideration to referrals potentially coming from additional sources and make changes as appropriate.
4. Seek out additional partners from long-term care facilities in Benton County and/or Cedar County for the IRTC program.
5. Make quality improvement adjustments based on findings from above surveys and assessments.
6. We will also include information on Alert Iowa and Disaster PrepWise and assist in registration to all participants (please reference Goal 3, Strategy 3.3c).

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons ages 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Target Linn county referrals to accept IRTC service and expand the service to the rural and underserved areas of Benton and/or Cedar counties.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 1.5 - #/% of populations/areas in greatest need consumers receiving IRTC services. #2: [Choose an item.] #3: [Choose an item.]	#1: 1.5 - # of IRTC program referrals who were successfully enrolled into the IRTC program. #2: [Choose an item.] #3: [Choose an item.]	#1: 1.5 - % of IRTC consumers who successfully transitioned from hospital to home for their recovery. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: Expand IRTC referrals by 5% from FY25 to FY26. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Increase IRTC enrollment by 10% from FY25 to FY26. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Increase successful transitions by 20% from FY25 to FY26. #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure(s) (if selected):
n/a
- Explanation of logic used to develop SFY 2026 targets:
The targets above are based on FY25 current usage, planned activities and anticipated results.

Statewide Performance Measures

Measure	Purpose	SFY 2025 Target	SFY 2025 Results as of 12/31/2024	SFY 2026 Target
#/% of Information and assistance callers indicating they received the information they were seeking.	To assess and provide information appropriate to the caller's need (from caller's perspective).	Number: 99% Percentage: 99%	Number: 1,177 Percentage: 99.2%	Number: 1,600 Percentage: 100%
#/% of options counseling consumers who indicate they were provided information to make an informed decision on goal and service need.	To evaluate the success of the service to assist individuals to make informed choices about long-term services and supports.	Number: Click or tap here to enter text. Percentage: 99%	Number: 25 Percentage: 100%	Number: 35 Percentage: 100%
#/% of Case management cases closed because case management service was no longer needed.	To determine whether case management consumers receive supports and services for as long as they need or desire them in order to remain in their residence of choice.	Number: Click or tap here to enter text. Percentage: 80%	Number: 11 Percentage: Successful 55%	Number: 10 Percentage: 60%
Average number of months a case management consumer experiencing independent living impairments is able to remain safely at home prior to transitioning to facility.	To determine whether case management consumers receive supports and services for as long as they need or desire them in order to remain in their residence of choice.	Number of months: 20 months	Number of months: 11 months	Number of months: 12 months

Goal 2: Improve Health and Wellness

Older adults and people with disabilities are empowered to utilize programs that improve their health and wellness.

Agency Programs, Services & Initiatives

Healthy aging includes supporting physical, mental and social well-being. This can include receiving proper nutrition and caloric intake, socializing, participating in wellness programs and making other positive lifestyle choices. This is not always achievable as a person ages due to financial barriers, physical limitations, cognitive decline and frailty that may impact ability to make safe and appropriate choices. Other physical and environmental barriers may contribute as well.

As identified through the Community Needs Assessment, evidenced-based programs, congregate and home delivered meals, nutrition counseling, nutrition education may help increase quality of life for those served.

Heritage has been a provider and subcontractor of congregate and home delivered meals for over 50 years. All congregate and home delivered meal menus are assessed by a dietician and meet all federal and state guidelines related to nutrition intake. The Community Needs Assessment shows these two core services are still a needed and valued program to many. Heritage is proud to partner with six subcontractors that provide 14 local congregate dining programs in their communities. Congregate meals region-wide are trending up, which is against the national and state trend of decline. Service providers cover all seven counties with home delivered meals, which contribute to the health and independence of older adults living in the community – especially those who are food-insecure or are transitioning to community living.

Heritage is a direct service provider for congregate meals with the Encore Café/Encore Express program. This national award-winning program serves meals at four locations: three in Linn County and one in Washington County. Encore Café is a choice menu program that includes a salad bar. This type of service model offers consumer flexibility to choose what is desired that day and also decreases food waste which leads to federal/state resources used in other areas of the nutrition program. The speakers and entertainment offer outlets for social interaction, expanded knowledge and better mental health. Encore Express is an innovative and progressive way for seniors to obtain dietician approved meals. Consumers are offered a dining card with eight meal credits loaded monthly. Seniors choose a meal from their local Hy-Vee's hot case or a MealTime To-Go. The included Hy-Vee locations all have cafeterias to dine in at the grocery store. Many choose to eat there and may socialize with other diners, while some choose to take meals home and eat with friends and family. The Encore Express program transitioned to the dining card system in the last year, which has greatly reduced staff time in program management and consumers are able to pick up meals during all grocery store hours. Program participants have options of breakfast, lunch or dinner. Encore Express is located in Johnson, Washington and Linn counties.

Heritage has offered evidenced-based programs since federal funding became available in FY2012. Heritage provides Tai Chi directly and consistently fills classes region-wide. Through priorities identified in the Community Needs Assessment, Heritage will put emphasis on rural and underserved metro neighborhoods for upcoming classes. Heritage has seen great success partnering with area libraries and city parks and recreation departments. As this funding does not cover the entire salary of the one full-time staff member that provides this service, Heritage has to be creative and find volunteer organizations or other organizations to help provide the service. Currently, Heritage partners with the Iowa City Senior Center to provide Walk with Ease and Matter of Balance. Partnerships such as this will be an area Heritage looks to expand during this Area Plan.

In the last year, Heritage sought guidance from ADS and the National Nutrition and Aging Resource Center to identify ways to address malnutrition. Heritage piloted a program with these partners to find interventions that effectively improve malnutrition scores and nutrition intake. Participants were selected based on those most at risk for malnutrition and with high nutrition risk. These consumers used two tools (one that is validated) to determine whether the interventions were successful. One successful intervention is referring high nutrition risk clients for nutrition counseling services: the dietician talks to the consumer about their barriers and creates a successful plan for consumers to follow. The dietician also makes referrals back to Heritage for services such as information and assistance, options counseling and case management. These additional Heritage services assess consumers' needs for added support. Grant dollars were obtained for this pilot. Heritage continues to work with ADS to help define what best practices may look like for other AAA's to utilize.

Typical consumers of **congregate nutrition** and **home delivered nutrition** are ages 60 to 84 (74%), white (95%), female (61%), live alone (58%) and have a high nutrition risk score (53%). Listed below are health and wellness services provided in FY2024 by Heritage and funded partners:

- **Congregate nutrition** – 1,627 consumers received 52,213 meals.
- **Home delivered nutrition** – 1,834 consumers received 248,373 meals.
- **Nutrition education** – 2,768 consumers received 19,376 units of service.
- **Health promotion: evidence-based** – 104 consumers received 118 units of service.
- **Health promotion: non evidence-based** – 16 consumers received 17 units of service.
- **Nutrition counseling** – 90 consumers received 104 units of service.

Objective #1: 2.1 - Increase availability and utilization of evidence-based classes offered to older adults to improve healthy lifestyle choices and overall health and wellness.

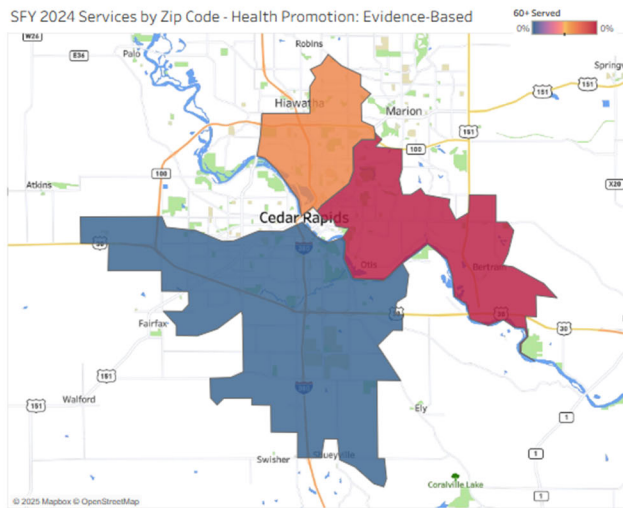
Why it matters...

Heritage sees evidenced-based programs as key to engaging seniors of all ages: it introduces healthy lifestyle choices, helps maintain physical fitness, strengthens balance and reduces the risk of falls. Heritage selects evidenced-based programs that offer an opportunity for socialization and have outcomes of improved strength and balance to meet the needs of our service area

While these programs are important, service area needs are greater than Heritage can successfully address on our own. Due to funding limitations, Heritage has only one staff member to lead classes in the seven-county region. In order to serve the region fully, Heritage needs to expand partnerships to provide quality programming. Based on gaps shown in the Community Needs Assessment, access to these programs in rural areas will be highlighted the next four years.

The first chart below shows the demographics of Heritage's evidence-based health promotion consumers in zip codes 52402, 52403 and 52404 for SFY 2024, as well as general demographics.

SFY 2024 Services by Zip Code - Health Promotion: Evidence-Based



Consumers by Zip Code

Res Zip	Consumers Served	Total 60+ Population
52402	5	6,799
52403	5	6,747
52404	2	7,687

Zip Code
Multiple values

Service	
Health Promotion: Evidence-Based	
Age Group	
60 - 74	9
75 - 84	3

In Poverty	
Don't Know	1
No	10
Yes	1

Rural	
Yes	5
No	7

Primary Ethnic Group (group...)	
White	12

Consumers Served by Service

Service	
Health Promotion: Evidence-Based	12

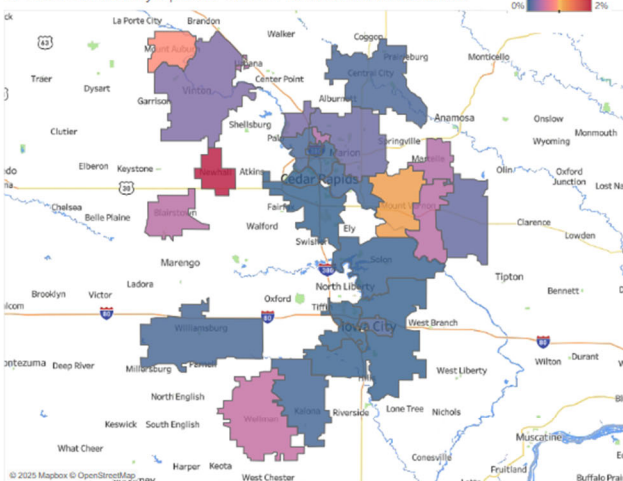
Ethnicity	
Not Hispanic or Latino	12

Lives Alone	
Yes	4
No	4
Missing	4

Dashboard Explanation

This dashboard combines data on services provided in SFY 2024, retrieved from WellSky, with American Community Survey (2017-2021) 60+ population data. The heat map above shows zip codes where a larger percentage of the population was served as red. The 'Zip Code' and 'Service' filters are applied to all tables. 'Consumers by Zip Code' displays the number served compared to the total 60+ population based on the service selected. 'Consumers Served by Service' presents the number of consumers who received each type of service based on the zip codes selected. The tables on the right provide the demographic break down of those who received services, again reflecting the zip codes and services selected.

SFY 2024 Services by Zip Code - Health Promotion: Evidence-Based



Consumers by Zip Code

Res Zip	Consumers Served	Total 60+ Population
52209	1	182
52214	1	858
52233	1	1,354
52240	2	6,051
52241	1	3,733
52245	6	4,751
52246	1	3,317
52247	1	1,244
52253	4	731
52302	23	9,757
52305	1	196
52306	1	477
52313	1	95
52314	15	1,116
52315	8	339
52328	3	610
52333	1	2,064
52341	1	368

Zip Code
All

Service	
Health Promotion: Evidence-Based	
Age Group	
60 - 74	60
75 - 84	36
85+	6

In Poverty	
Don't Know	17
No	79
Yes	6

Rural	
Yes	37
No	63
Don't Know	2

Primary Ethnic Group (group...)	
White	100
Missing	2

Consumers Served by Service

Service	
Health Promotion: Evidence-Based	102

Ethnicity	
Hispanic or Latino	1
Not Hispanic or Latino	100
Missing	1

Lives Alone	
Yes	30
No	53
Missing	19

Dashboard Explanation

This dashboard combines data on services provided in SFY 2024, retrieved from WellSky, with American Community Survey (2017-2021) 60+ population data. The heat map above shows zip codes where a larger percentage of the population was served as red. The 'Zip Code' and 'Service' filters are applied to all tables. 'Consumers by Zip Code' displays the number served compared to the total 60+ population based on the service selected. 'Consumers Served by Service' presents the number of consumers who received each type of service based on the zip codes selected. The tables on the right provide the demographic break down of those who received services, again reflecting the zip codes and services selected.

The chart above shows the demographics of all Heritage evidence-based health promotion consumers for SFY 2024.

Evidence-based programs are important for socialization, improved strength and balance and overall health and wellbeing. The maps above show where Heritage has pockets in rural areas where we can best utilize limited resources to increase availability and utilization of this mandatory service.

What we are doing...

Strategy: 2.1b - Provide evidence-based health promotion programming to populations/areas in greatest need to change knowledge, skills, and/or behaviors.

- Explanation of Other Strategy (if selected):
n/a

Activities:

- Offer three classes in rural areas of the region, particularly underserved parts of Iowa, Cedar and Linn counties.
- Connect with organizations/agencies in rural areas to research potential trained leaders to teach classes. Heritage captures units from Walk with Ease at the Iowa City Senior Center, which could serve as a model for this service delivery.
- Explore monthly food distributions as a time and place to offer an evidence-based companion program to attendees.
- Research and offer an evidence-based class to support caregivers other than Powerful Tools for Caregivers. This program has not been successful in our region lately: classes from Heritage and other local providers continue to be cancelled due to low participation to meet the fidelity of the program.
- Work with Family Caregiver Center of Mercy, Veteran Affairs caregiver specialists, and other agencies to identify ways to refer more caregivers into evidence-based caregiver programs.
- Research ways to integrate programming with malnutrition pilot program, food distributions and Encore Café diners. Replicate in other areas of the region later in Area Plan cycle.
- Survey attendees to evaluate if their knowledge and skill level increased after attending an evidence-based class.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Heritage will focus classes on rural areas of the region and also in a high need community within Cedar Rapids. The urban class will tie into an established food distribution in a low-income neighborhood. Focus areas will include Iowa and Cedar counties, as well as zip codes 52401, 52402 and 52403 in Linn county.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 2.1 - #/% of populations/areas in greatest need consumers referred to evidence-based health promotion programs. #2: [Choose an item.] #3: [Choose an item.]	#1: 2.1 - # of health promotion evidence-based classes delivered. #2: [Choose an item.] #3: [Choose an item.]	#1: 2.1 - %/# class attendees who indicate a change in their knowledge, skills, or behavior after attending an evidence-based health promotion class. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: # of attendees from Iowa, Cedar counties and from zip codes of 52401, 52402, and 52403 in Linn county. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Rural classes will increase by 3 this FY. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 75% of consumers surveyed state they improved their knowledge or skills after attending the class. #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure (if selected):
n/a
- Explanation of logic used to develop SFY 2026 targets:
With the emphasis being placed on reaching more consumer in the rural areas, targets were chosen to reflect that approach.

Objective #2: 2.2 - Increase older adults' access to high quality and person-centered nutrition services.

Why it matters...

Nutrition is crucial for older adults as they age: it helps maintain health, prevents chronic diseases and improves overall well-being. Heritage has found through the Community Needs Assessment and through communication with our nutrition providers that food insecurity is a silent problem in older adults in our region. Food insecurity and senior hunger are often caused by transportation barriers, fixed incomes, increased health concerns and social isolation. Providing congregate dining where seniors can eat a meal and socialize decreases loneliness and improves mental health. For those struggling with mobility, obtaining groceries or cooking, home delivered meals offer a nutritious meal allowing consumers to continue aging in a place of their choosing while maximizing independence.

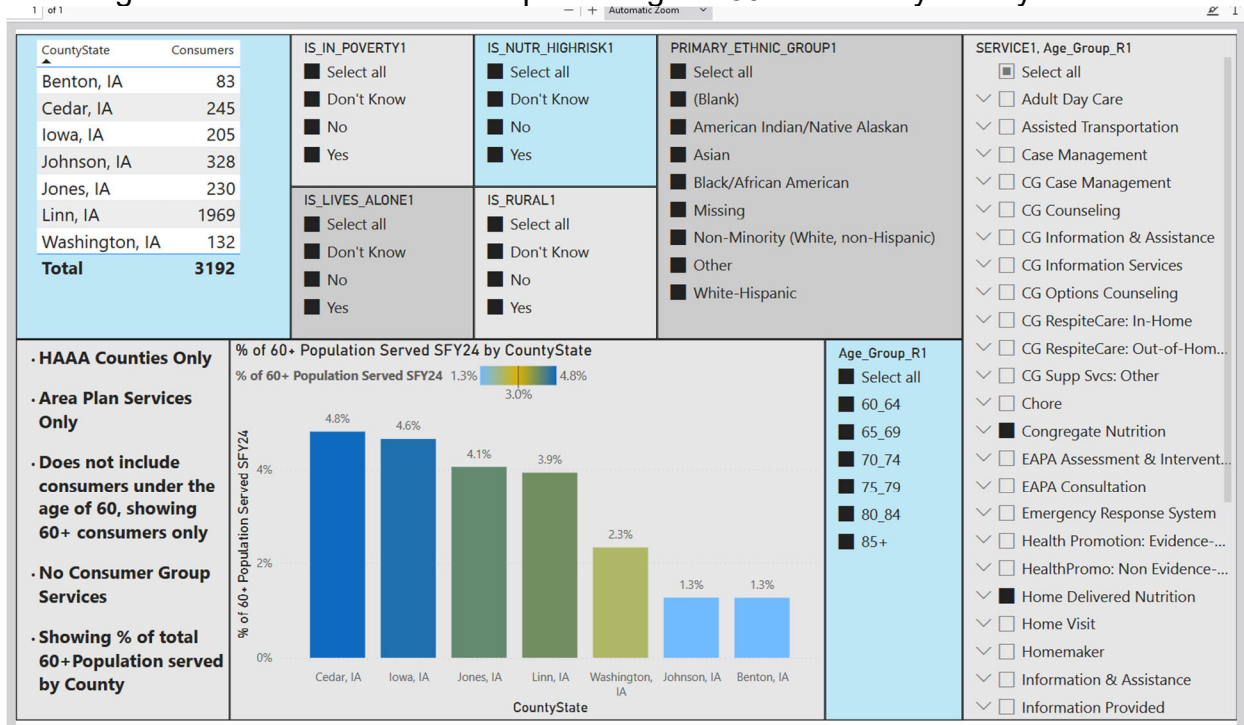
Because Heritage and subcontractors provide the region with most of the congregate and home delivered meals, there are pockets that appear to be underserved. In reality, there are home delivered meal and congregate meal programs that are funded privately and/or with other funding that is not Older Americans Act. These areas include rural Washington County (Wellman and the Washington YMCA) and Benton County (Vinton and a Belle Plaine nursing home serving home delivered meals). Heritage has relationships with these entities and is supportive of their efforts.

Based on Needs Assessment and subcontractor input, Heritage has identified areas in the region that need meal services: Johnson, Benton, Iowa and Washington counties, as well as rural Linn County. A provider that serves Johnson County participated in the community hearing related to Heritage's FY27-29 RFP process. Letters of intent were due Feb. 26th with the provider indicating they intended to RFP for congregate meals in FY27. Johnson County has an Encore Express program, and a physical congregate meal location would enhance this model.

While adding additional sites will compliment the consumer needs to be addressed, it will also impact budgeting this Area Plan cycle. Heritage and subcontractors may implement wait lists due to increased consumer needs in the congregate nutrition program, home delivered nutrition program and nutrition counseling. Limited state,

federal and grant dollars are not able to sustain the growing need and the anticipated new locations.

The chart below shows congregate and home delivered consumers served in SFY24, including number of consumers and percentage of 60+ served by county.



What we are doing...

Strategy: 2.2d - Develop strategies to reach populations/areas in greatest need to increase nutrition service utilization.

- Explanation of Other Strategy (if selected):
n/a

Activities:

Click or tap here to enter text.

- Connect with Johnson, Washington, Benton, and Iowa county leaders and other regional agencies to help identify pockets of greatest need for meal site locations.
- Recruit and obtain a consumer option for home delivered meals in the underserved areas of eastern Benton and Iowa Counties with a goal of providing at least three meals per week.
- Recruit and obtain a consumer option for congregate meals in the underserved area of Johnson County with a goal of providing at least three meals per week.
- Discuss possible systems and approaches to funding the new location in each of the identified areas.

- Analyze Encore Café locations and consumer utilization to evaluate if these locations are still appropriate.
- Continue to expand participation in St. Paul's United Methodist Church monthly food distributions and access to services available to consumers including: information and assistance, options counseling, evidence-based programming, nutrition counseling, and nutrition education.
- Research the increased flexibility in rules about offering other means of nutrition services in years 3 and 4 of the Area Plan cycle, such as Grab and Go meals.
- Use the Enhanced Determine Checklist with a large provider in Linn County to help with consumer prioritization during this planning period.
- Monitor need for implementing consumer wait lists in home delivered nutrition, congregate nutrition and nutrition counseling.
- Communicate and work closely with ADS and local providers to consider and implement program wait lists (as needed) and consumer prioritization.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Based on mapping data above and Community Needs Assessment, Heritage will focus this first year of the Area Plan on congregate in Washington/Johnson County and specific areas in Benton and Iowa counties and metro Cedar Rapids, zip codes of 52401, 52402, 52403. First FY of Area plan will be measuring congregate meals.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 2.2 - Total # of consumers who received meals through the congregate nutrition program. #2: [Choose an item.] #3: [Choose an item.]	#1: 2.2 - #/% of consumers who are of populations/areas in greatest need. #2: [Choose an item.] #3: [Choose an item.]	#1: 2.2 - #/% congregate nutrition consumers who indicate during intake they are at higher nutrition risk. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: 1500 consumers #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 624 consumers in focus areas #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 45% of congregate nutrition consumers in focus area as high nutrition risk #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure (if selected):
What we do:
- Explanation of logic used to develop SFY 2026 targets:
Targets were chosen based on the Needs Assessment and areas of greatest concern and in this FY will focus on congregate meals.

Objective #3: 2.3 - Connect older adults who are at risk for malnutrition and/or have high nutrition risk scores with meaningful interventions.

Why it matters...

Malnutrition can significantly impact an older adults' quality of life, health and overall well-being. It can be caused by a variety of factors including food insecurity, loss of

appetite, lack of ability to chew and swallow, and increased use of prescription medications. Other risk factors include depression, dementia, chronic diseases, and lack of access to nutritious food, or lack of ability to prepare and/or shop for food. Heritage has partnered with ADS and the National Resource Center on Nutrition and Aging to pilot a program to identify consumers at risk of malnutrition, implement a process to connect them with meaningful interventions and evaluate the effectiveness of the intervention.

Heritage has implemented malnutrition screening using the Malnutrition Screening Tool and has screened over 2,000 consumers for the pilot program. Of those enrolled in the program, it is not particularly surprising that 73% of participants thus far are food insecure, many of whom indicated they depend only on the food pantry for food. Notably, a majority of the food insecure individuals are aware of other community resources and choose to not apply or participate. Heritage staff encounter significant barriers in helping these consumers apply for benefits or use available programs, and trust between these individuals and the social service/health provider system is poor. The contracted dietician providing nutrition counseling to these individuals has noted significant concerns with their health status, some with untreated open sores and untreated chronic conditions. Many of these participants indicate they are aware of accessible medical care, yet choose not to use it. This barrier in gaining trust is difficult to understand yet appears to be one critical component to supporting these consumers.

Lesson learned from the pilot include:

- People with high scores tend to not respond well to traditional assessment and referral processes;
- Trust is hard to gain. This is a larger systematic problem that through the pilot process Heritage can glean insights into how to break down barriers.

This pilot is slow going due to amount of time it takes with consumers to complete the Enhanced Determine process and finding barriers/solutions and creative ways to connect with this population that at times can be transient.

What we are doing...

Strategy: 2.3e - Implement a workflow process to identify consumers whose intake or assessment responses indicate high nutrition risk and/or risk of malnutrition to refer them to additional service interventions, such as nutrition counseling or options counseling.

- Explanation of Other Strategy (if selected):
n/a

Activities:

Utilize high nutrition risk score and malnutrition risk questions on consumer intake

form to identify individuals that may be at risk and enroll in pilot program.

Leverage Determine checklist using Enhanced Determine to identify malnutrition risk factors and related meaningful interventions for consumers who have screened at risk for malnutrition and have a high nutrition risk score of 10 and higher.

Prioritize consumers who screen at risk for malnutrition and/or high nutrition risk for nutrition counseling service.

Implement process to identify and offer nutrition counseling service to consumers who screen at risk for malnutrition and/or high nutrition risk.

Offer evidence-based program during food distributions, as many of the pilot program participants partake of the distributions.

Work with Iowa Community HUB to assess and implement services they may have to offer such as food boxes for individuals that are part of this pilot program.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

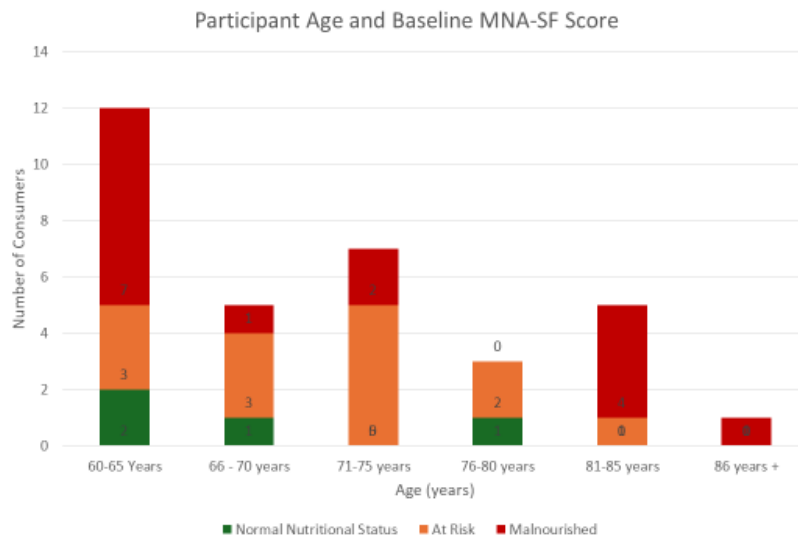
- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Jill please answer and explain charts

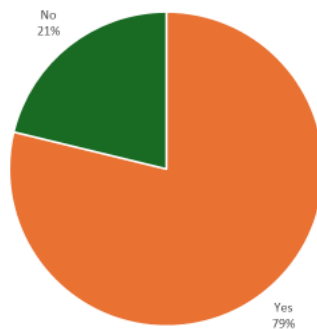
Continue to serve most at risk in the pilot location in the Linn county zip codes of 52401, 52402, 52403 and those identified by internal Heritage care team members.

Who We Are Reaching



Who We Are Reaching

Baseline MNA-SF: "Has suffered psychological stress or acute disease in the past 3 months"



Examples of acute disease

Pneumonia, appendicitis, flu, infection, broken/fractured bones; other hospital admissions for CHF, Diabetes.

Examples of psychological stress-

Death in family, marital/family stress, financial crisis, health problems, other mental health disorders.

Next Steps:

- Collect second MNA-SF and consumer satisfaction survey from 28 consumers who have completed the Enhanced Determine Survey and a follow up meeting.
- Assess for programs and resources to support emotional health and wellbeing and reduce psychological stress to further improve quality of referrals to address emotional health and wellbeing.
- Project Evaluation to determine effectiveness of intervention.

Of the 28 completed Enhanced Determine Surveys:

DETERMINE Your Nutrition Risk Questions	% of Yes Responses	# of Yes responses	Additional information
I eat fewer than 2 meals a day	50%	14	Why? Poor appetite (86%) Unable to afford food (71%)
I eat few fruit, vegetables, or milk products	68%	19	
I have 3 or more drinks of beer, liquor or wine almost every day	0%	0	
I have tooth or mouth problems that makes it hard for me to eat	61%	17	
I don't have enough money to buy the food I need	61%	17	7 participants report they are enrolled in SNAP
I take 3 or more different prescribed or over-the-counter drugs a day	75%	21	
Without wanting to, I have lost or gained 10 pounds in the last 6 months	61%	17	15 consumers report weight loss of > 10 lbs
I have an illness or condition that made me change the kind and/or amount of food I eat.	43%	12	
I am not always physically able to shop, cook and/or feed myself	50%	14	
I eat alone most of the time	61%	17	

What We Have Learned:

- Developed an improved process for nutrition counseling dietitian to share expert information with Heritage AAA, translating to more meaningful and effective person-centered interventions.
- Completion of the Enhanced Determine Survey takes between 20 and 60 minutes per consumer.
- Developed service, resource and referral descriptions in an effort to improve quality and take rate of appropriate referrals.
- Developed and refined a Smart Logic-enabled tool to eliminate redundancy and improve efficiency
- Psychological stress and expressed needs related to emotional wellbeing are often coming up during the Enhanced Determine survey. This information can be used in the future to inform evaluation of interventions and design interventions that support social-emotional health, including new partnerships.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 2.3 - Total # of nutrition consumers who are screened for malnutrition and/or high nutrition risk. #2: [Choose an item.] #3: [Choose an item.]	#1: 2.3 - #/% of OAA consumers who screen "more at-risk" for malnutrition who complete the Enhance Determine assessment to identify meaningful interventions. #2: [Choose an item.] #3: [Choose an item.]	#1: 2.3 - #/% of Nutrition Counseling consumers who indicate they are at high nutrition risk. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: 1,000 individuals will be screened for malnutrition pilot project. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 40 consumers #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 75% #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure (if selected):
Click or tap here to enter text.
- Explanation of logic used to develop SFY 2026 targets:
Based on malnutrition pilot program data.

Statewide Performance Measures

Measure	Purpose	SFY 2025 Target	SFY 2025 Results as of 12/31/2024	SFY 2026 Target
#/% of nutrition consumers served who indicate during intake they are	To prioritize consumers who are at risk for social isolation.	Number: Click or tap here to enter text. Percentage:	Number: 736 Percentage: 28%	Number: 740 Percentage: 25%

Measure	Purpose	SFY 2025 Target	SFY 2025 Results as of 12/31/2024	SFY 2026 Target
socially isolated.		Click or tap here to enter text.		
#/% of nutrition consumers served who indicate during intake they are at higher nutrition risk.	To prioritize consumers who have a higher nutrition risk.	Number: Click or tap here to enter text. Percentage: Click or tap here to enter text.	Number: 1,268 Percentage: 48%	Number: 1,200 Percentage: 45%
#/% nutrition consumers served who indicate during intake they are food insecure.	To prioritize consumers who are at risk for food insecurity.	Number: Click or tap here to enter text. Percentage: Click or tap here to enter text.	Number: 549 Percentage: 21%	Number: 550 Percentage: 20%
#/% nutrition consumers served who indicate during intake they are at risk for malnutrition.	To prioritize consumers who are at risk of malnutrition.	Number: Click or tap here to enter text. Percentage: Click or tap here to enter text.	Number: 275 Percentage: 10%	Number: 275 Percentage: 10%
#/% nutrition counseling consumers served who indicate during intake they are at risk for malnutrition.	To ensure those at risk for malnutrition receive nutrition counseling so that they have the opportunity to improve their nutrition status.	Number: Click or tap here to enter text. Percentage: Click or tap here to enter text.	Number: 16 Percentage: 30%	Number: 15 Percentage: 30%

Goal 3: Improve Safety and Quality of Life

Older adults and people with disabilities are safe from all forms of mistreatment and are empowered to improve their quality of life.

Agency Programs, Services & Initiatives

Through the Community Needs Assessment and through data on page 42 below, it shows the rural areas of Benton, Cedar and Jones counties underserved by EAPA (elder abuse prevention and awareness) assessment and intervention. Outreach to increase awareness of the Heritage Elder Rights program will be essential to improve safety for older adults, adults with disabilities and caregivers to prevent or alleviate mistreatment and empower them to improve their quality of life. This goal to improve safety and quality of life for those in the Heritage region includes the services of information and assistance, EAPA, legal services and emergency preparedness/response.

Older adults are the fastest-growing age demographic. As people age they can become more at risk for neglect/self-neglect, exploitation and abuse, which can have several physical and emotional effects on an older adult. Victims are fearful and anxious, may be untrusting, or could be ashamed to tell anyone they are being abused. They may fear retaliation or punishment, or they may have concerns about having to move from their home or community. They may also feel a sense of family loyalty that prevents reporting when a spouse, sibling or child who is their abuser. Legal assistance is crucial for victims facing complex legal issues related to healthcare, housing, finances and estate planning. Legal hurdles can significantly impact their independence, security, and quality of life and may lead to further exploitation and abuse.

It is important that the older person have access to information to make informed decisions and be aware of available help. This may include support from family members, friends, health care providers, social services, police, legal professionals, faith communities or the EAPA program at Heritage.

In addition, older adults need to prepare for emergencies of all types. Preparation improves an older adult's likelihood to be resilient to emergencies – whether that is if from elder abuse or that of severe weather.

Current trends:

Older adults and family caregivers need legal education to prevent abuse. Many times, people don't think of the legal complications that may occur before it is too late. These conversations can be difficult and therefore easy to put off, but by the time help is needed it may be too late. For example, if an older adult develops dementia, they may no longer be able to consent to establishing a Power of Attorney. Instead they must pursue more expensive measures like a Conservator or Guardianship through the courts. In other instances, an individual may become reliant on the care of someone

who uses the older adult's funds for personal expenses. The older adult doesn't feel they can say anything because the caregiver has told them no one will listen and they will "put them in a home" if they object. These are real life situations our agency deals with every day. Many times, such circumstances can be prevented with the older adult and their caregivers understanding their rights, legal options, and protections. Legal education provides empowerment and knowledge to have conversations regarding finances, care wishes and personal goals which can prevent abuse, neglect and exploitation.

The majority of legal services in the Heritage region are cases related to housing, income, Medicaid, abuse/neglect and healthcare concerns. Emerging issues include individuals who are being scammed by companies that claim to do repairs, but do not perform any work after a down payment is made. There are also Love Scams in which an older adult meets someone online and starts sending them money. The scammer then threatens to end the relationship if the older adult doesn't send more, preying on the victim's fear of isolation and loneliness.

Older adults face even more complicated needs when risk factors such as substance abuse, mental illness or homelessness are involved. This makes their resiliency more difficult with greater obstacles. These factors make serving the older adult even more challenging – yet more needed – due to the higher risk posed to safely living in their home setting of choice.

Emergency preparedness is also crucial for older adults. According to FEMA, in United State, older adults are especially vulnerable during emergencies such as severe weather. Those who live alone face challenges such as isolation, limited mobility, and medical needs, which can lead to worse outcomes in emergencies. In Iowa, 30% of older adults live alone, making them even more at risk for poor outcomes. It is essential for seniors to have a disaster preparedness plan in place, including a list of contacts they can reach out to for help if their primary caregiver is unavailable. This Area Plan Cycle, the Heritage Care Team will focus on educating and enrolling consumers in Alert Iowa. Through Alert Iowa, state and local officials are able to utilize a single, statewide notification system that provides local control of how and when to disseminate emergency and public safety messages.

Partnerships

Heritage has many partners that help us reach individuals eligible for services. The needs in our region are complex and require effective partnerships across the human services sector to be addressed comprehensively.

One example is in legal services. Heritage does not have an attorney on staff, but we regularly work with Iowa Legal Aid, the University of Iowa College of Law and the Legal Services Developer at Iowa Health and Human Services – Aging & Disability Services Division. Legal assistance is subcontracted with Iowa Legal Aid, which services older adults in need and provides reports on emerging trends. The University of Iowa College of Law's student-run clinic provides reciprocal referrals and has presented at Heritage

events many times. The Legal Services Developer at ADS has consulted the agency on certain situations and will be asked to help with community education.

My Care Community is a network of community organizations who work together to connect consumers with needed services. This is done through the Unite Us platform, which is utilized to easily connect consumers with other agency referrals.

Heritage works with Linn County Emergency Management Agency to promote Alert Iowa and reports to the EMA how many older adults have registered. Heritage also serves on Linn Area Partners Active in Disaster meetings and Johnson County Community Organizations Active in Disaster, as well as the county emergency management offices in all seven counties.

Heritage has a strong and long-standing relationship with the University of Iowa College of Public Health's Disaster PrepWise program. Heritage currently hosts one of their AmeriCorp members at the agency as they promote the program, assist with registrations and hold workshops to make older adults and their caregivers more prepared in the event of an emergency.

In addition, Heritage staff participate in emergency response drills and trainings. Heritage regularly reviews the internal Emergency Plan and is currently updating that plan based on new OAA regulations and most recent emergencies. Similar plans are required of all subcontractors, who provide copies to the agency as needed.

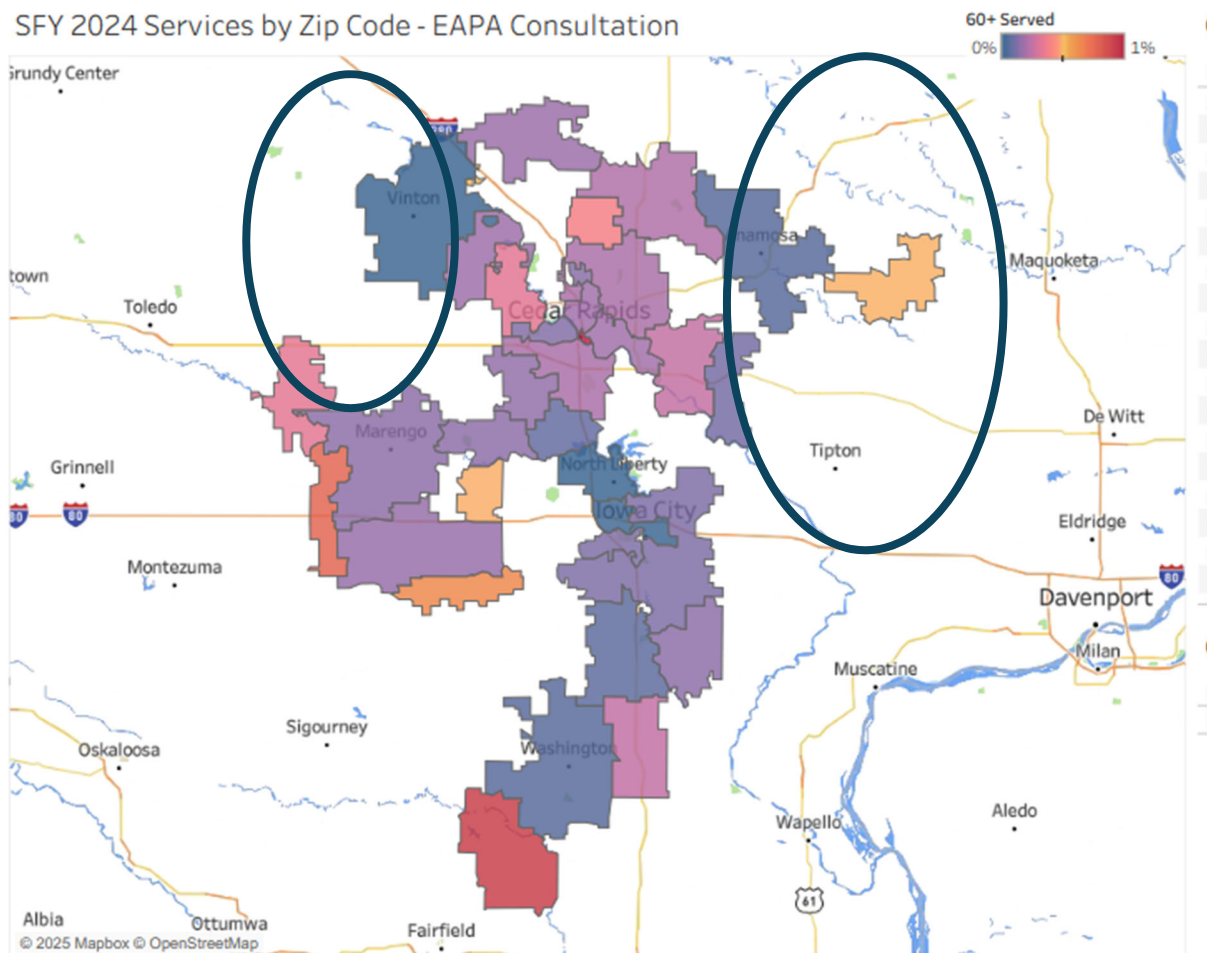
A current typical consumer served by Heritage in FY2024: Heritage's information and assistance program served 1,340 individuals with 3,105 units of service. Elder abuse prevention and awareness (EAPA) provides a number of services (listed below) to persons aged 60 years and older who are experiencing emotional, physical, financial abuse, and/or neglect. In FY2024, Heritage provided 147 consumers with 285 units of **EAPA consultation** services and 189 consumers were provided with 2,016 hours of **EAPA assessment & intervention**. A typical consumer is between 60-84 years of age (84%), White (71%), and female (59%). Half of consumers live alone. Additional demographic information is provided in the chart below. Legal assistance was provided by a Subcontractor. They served 1,239 individuals with 1,675 hours of service.

Objective #1: 3.1 - Increase awareness, prevention, and reporting of elder abuse and dependent adult abuse.

Why it matters...

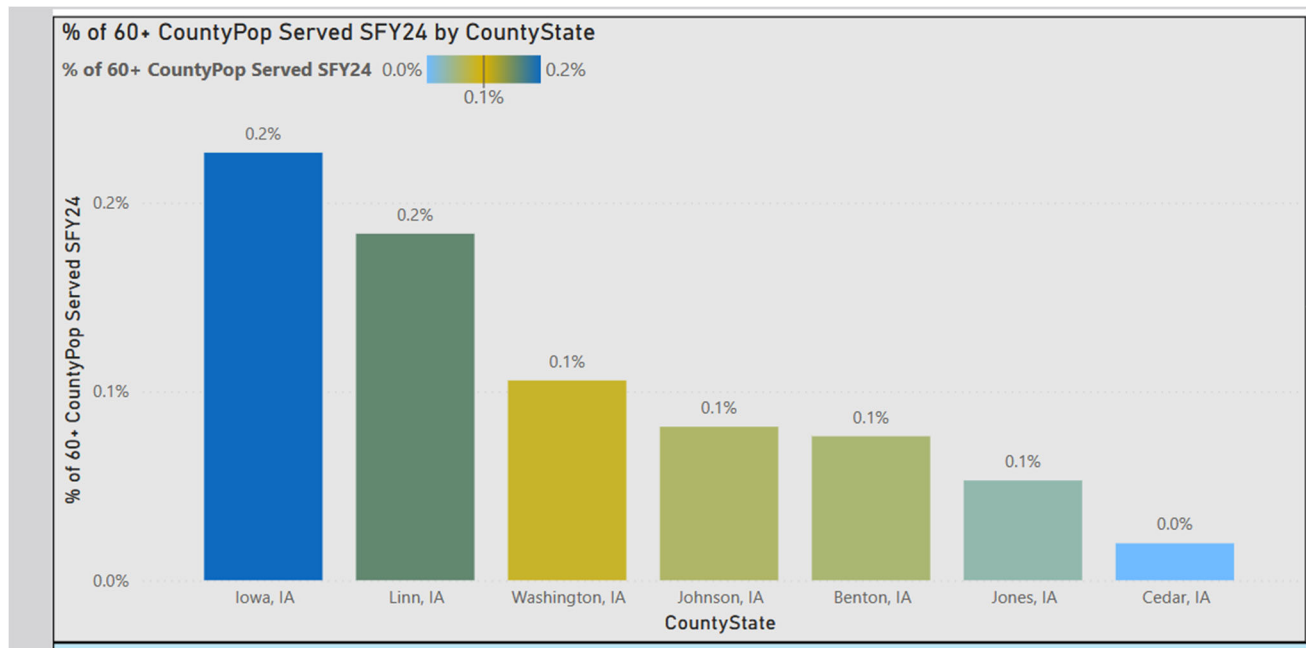
The desired outcome for the objective is to increase referrals coming from partners in the areas being underserved in our region with particular attention to Cedar, Jones and Benton counties.

The first map below shows SFY24 Heritage EAPA consultation gap areas of Cedar, Jones and Benton counties. EAPA consultation represents the initial referral.



Dashboard Explanation

The second chart below shows EAPA assessment & intervention consumers by county. It also shows that disproportionately fewer older adults are served in Cedar, Jones and Benton counties.



What we are doing...

Strategy: 3.1a - Develop and/or strengthen partnerships with other agencies to increase referrals of populations/areas in greatest need to the Elder Abuse Prevention and Awareness program.

- Explanation for Other Strategy (if selected):
n/a

Activities:

Heritage's Elder Rights Coordinator (ERC) will find five key points of contact or "champions" to reach out to in Cedar, Jones and Benton counties for specific trainings regarding elder abuse and the elder rights program.

ERC and/or Elder Rights Specialists (ERS) will build relationships with at least five

key stakeholders each in Cedar, Jones and Benton counties by going in person to entities such as police departments, fire departments, and public health offices for outreach opportunities.

ERC will work with Community Engagement Coordinator to create materials and flyers to distribute to local entities such as healthcare, banks, and social services.

ERC will attend local events such as resource fairs, farmer's markets, or other free events as appropriate in Cedar, Benton and Jones counties.

ERC will explore marketing/advertising opportunities in Cedar, Benton and Jones counties if funding or free opportunities arise.

ERC will attend Iowa County Resource Meeting at least quarterly to make key points of contact and talk about the Elder Rights Program. The Iowa County Resource Meeting involves public health, hospital social workers, first responders, librarians and more. Attendees discuss community resources and maintain professional connections that help link eligible individuals to key programs and contacts. ERC will also research if similar groups exist in Cedar, Benton and Jones counties. If so, these meetings will be regularly attended.

ERC will explore offering trainings to older adults, adults with disabilities and family caregivers at libraries or community centers in Cedar, Benton and Jones counties.

ERC will explore offering trainings to local entities such as banks, libraries, meal sites, public health, etc. in Cedar, Benton and Jones counties.

ERC will form stronger connections with public health offices in Cedar, Benton and Jones counties by doing outreach or attending other meetings as appropriate.

ERC and/or ERS will attempt to connect with Clerk of Courts offices where older adults can file Petitions for Relief Against Elder Abuse in Cedar, Benton and Jones counties. The Clerk could point victims to our programing for assistance with filing these documents and access to other needed services if they are aware of what we do.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Based on maps, data of those previously served and our community needs assessment, Heritage shows gaps in Benton, Cedar and Jones counties.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 3.1 - #/% of populations/areas in greatest need consumers provided with EAPA Assessment & Intervention. #2: [Choose an item.] #3: [Choose an item.]	#1: 3.1 - # of and type of public education trainings to identify and prevent abuse of older individuals. #2: [Choose an item.] #3: [Choose an item.]	#1: 3.1 - #/% of EAPA Assessment & Intervention consumer cases closed with EAPA services no longer needed. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: Increase of 5 consumers each in Cedar, Benton and Jones counties compared to FY25 #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 3 more elder abuse trainings provided in Cedar, Benton and Jones counties compared to FY25 #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 85% of cases to be closed with EAPA services no longer needed. #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure (if selected):
n/a

- Explanation of logic used to develop SFY 2026 targets:
Targets for FY26 are based upon our planned activities and desired results to increase referrals of older adults living in the identified counties and experiencing abuse. We have also factored in realistic expectations based on staff capacity in performing the planned activities.

Objective #2: 3.2 - Provide access to high-quality legal assistance for older adults.

Why it matters...

Heritage's desired outcome for this objective is to have a knowledgeable and educated older adult population able to identify what abuse is, how they can prevent it and what steps to take if they find themselves in this situation.

The second chart above on page 43 shows EAPA assessment & intervention consumers by county in Goal 3, Objective 1, Strategy 1 represents the number of older adults served by county. Heritage presumes that if more older adults and their caregivers are educated on elder abuse, legal protections and rights, this could prevent some instances of abuse.

What we are doing...

Strategy: 3.2a - Offer two annual trainings in coordination with ADS on topics including medical powers of attorney, financial powers of attorney, advance directives, IPOST, end of life planning, defense to guardianship and conservatorship, and financial scams.

- Explanation for Other Strategy (if selected):
n/a

Activities:

1. Contact ADS Legal Services Developer to request assistance in presenting at least twice in the Heritage region, preferably in person and in Cedar, Benton and/or Jones counties.
2. Heritage will review Iowa Legal Aid's quarterly report and emerging trends data to identify hot topics to best serve the region based on needs reported.
3. Heritage will consider greatest social need in determining topics. Issues such as housing instability, isolation or other factors will be considered as well.

4. Heritage will offer a Zoom presentation for the region on elder abuse laws and how they impact the lives of older adults. These presentations will be done twice per year by the Elder Rights Coordinator.
5. Create pre/post-test or survey to be implemented at legal education events to measure increased knowledge from attendees.
6. Marketing of all legal education events will be done via press release, website, Facebook and through partners identified in the EAPA partner development process identified in Objective 1 of this Goal.
7. Heritage will post recordings of trainings to our website for future viewing as appropriate.
8. Heritage will invite Iowa Legal Aid to present at least one Heritage event a year.
9. Heritage will utilize our Caregiver Wellness Day partnership distribution list to assist with community awareness of events. The list consists of in-home service providers, senior housing, long term care, and other community providers throughout the region.
10. Heritage will post information on scams to our Facebook page as scam/fraud trends are identified in our region.
11. Heritage will participate in the annual "Slam the Scam" initiative which is a national effort to increase awareness of scams and how individuals can protect themselves.
12. Heritage will participate in the Iowa Association of Area Agencies on Aging (i4a) annual initiatives in June for Elder Abuse Awareness Month. In previous years, this has involved Elder Rights Coordinators from each Area Agency on Aging (AAA) creating a video on an elder abuse topic, with all AAAs sharing the videos to facilitate state-wide education.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): [Select a population.]

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Based on maps, data of those previously served and our Community Needs Assessment, Heritage shows gaps in Benton, Cedar and Jones counties. Education in these areas are critical to increase awareness of the program and will be our area of focus to reach Objective #2. We will focus on Cedar, Benton and Jones counties for the first year of the Area Plan and reassess based on results for future years.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 3.2 - Total # of consumers referred to OAA legal assistance. #2: [Choose an item.] #3: [Choose an item.]	#1: 3.2 - # of educational opportunities provided to community that focused on legal issues including hot topics. #2: [Choose an item.] #3: [Choose an item.]	#1: 3.2 - Total # of consumers who indicate a change in knowledge, skills, and/or behaviors after receiving education on legal issues. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: 10% increase in referrals to Iowa Legal Aid through I&A/FC I&A compared to FY25 #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: A minimum of 5 events on legal topics will be held in the Heritage region in FY26 #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 30 attendees (or 80% of attendees) if 20 attendees do not attend report that they have a change in knowledge, skills and /or behaviors due to legal education #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure (if selected):
n/a
- Explanation of logic used to develop SFY 2026 targets:

Targets for FY26 are based on planned activities for this strategy. These will be new activities, thus projections are based on anticipated success of the strategies and planned ability to track this information.

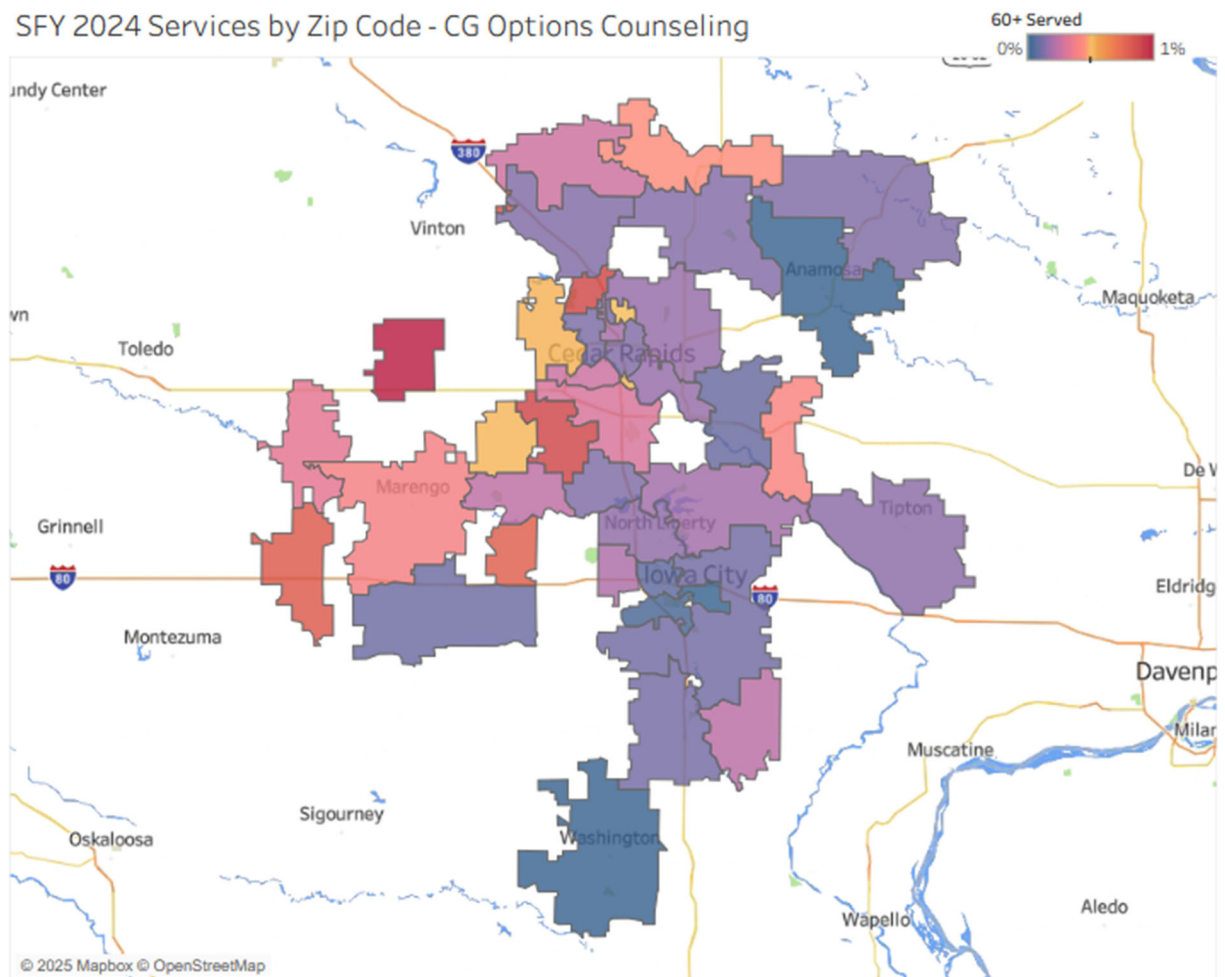
Objective #3: 3.3 - Strengthen emergency preparedness among care recipients, caregivers, and providers.

Why it matters...

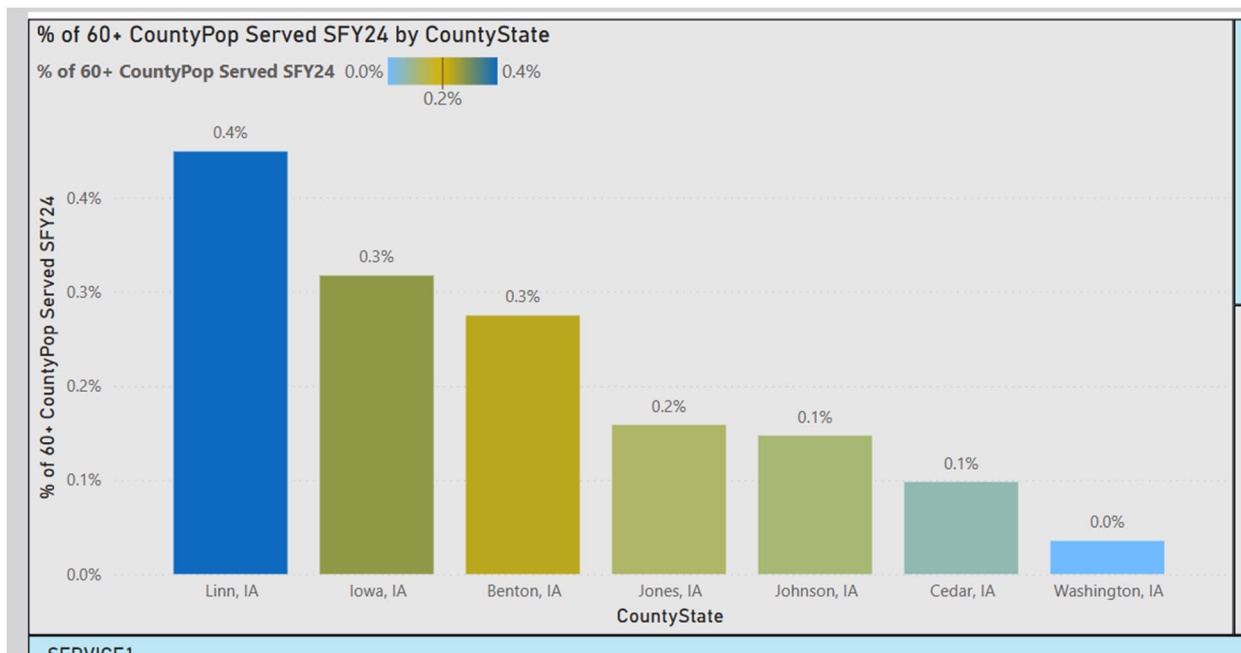
Heritage's desired outcome for this objective is to have a more educated, prepared, and resilient older adult, adult with disabilities and family caregiver community in order to cope with emergencies and be able to return to normal or the new normal as soon as possible.

The map below shows the location of individuals served through caregiver options counseling in FY24, thus our potential reach for emergency response planning efforts.

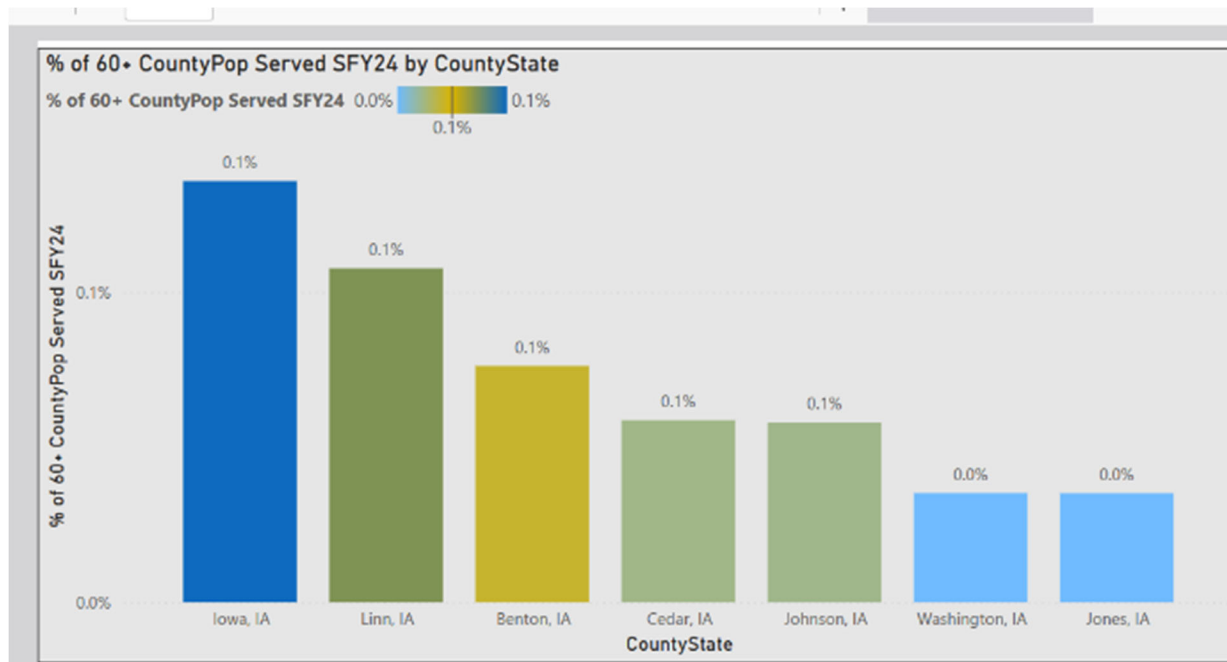
SFY 2024 Services by Zip Code - CG Options Counseling



The chart below shows the FY24 percentage of 60+ consumers served by county through caregiver options counseling, options counseling (which includes IRTC consumers), thus our potential reach for emergency response planning efforts.



The chart below shows the FY24 percentage of 60+ population served by county through caregiver case management and caregiver options counseling, thus our potential reach for emergency response planning efforts.



What we are doing...

Strategy: 3.3c - Refer Options Counseling consumers to resources where they can create their own individual emergency plan.

- Explanation for Other Strategy (if selected):
n/a

Activities:

1. All Options Counselors, IRTC staff and Case Managers will be trained on Alert Iowa and Disaster PrepWise: how it works, its benefits and how to register.
2. Alert Iowa flyers will be included in all new consumer folders for review.
3. Heritage staff will ask consumers if they are interested in learning more about Alert Iowa and/or Disaster PrepWise. If they are, staff will demonstrate the website or, if internet access is not available, provide information on the system.
4. Heritage will reach out to our ADRC technical assistance provider, University of Iowa Center for Disability and Development (UICDD)/Iowa Compass, to educate them on Alert Iowa and Disaster PrepWise and encourage training for all ADRC partners.
5. Heritage will reach out to Disability Access Points (DAPs) in our region to introduce ourselves, explain our services and include information on Alert Iowa and Disaster PrepWise to encourage educating their consumers.
6. Subcontractors will be educated on Alert Iowa and Disaster PrepWise at the annual mandatory subcontractor meeting.

7. Information on Alert Iowa and Disaster PrepWise will be included in materials for all in-person caregiver education and legal education events.
8. Heritage will continue partnership with Linn County EMA serving as a resource for the community if they need assistance registering for Alert Iowa.
9. Heritage will continue partnership with the University of Iowa College of Public Health on Disaster PrepWise.

Populations in Greatest Economic Need: Persons ages 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ who are living alone

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): Caregivers who need additional support in assisting others to live independently

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

The Area of Focus for this strategy will be all clients served through options counseling, caregiver options counseling, IRTC and case management, caregiver case management regardless of their residence. Individuals with low income are less likely to have resources to recover due to unplanned expenses during an event. Caregivers have the most risk in emergencies, as they have not only their needs to address but those of their care recipient too. Thus, advanced planning is critical in preparing for emergencies that may disrupt communication with or access to the care recipient.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 3.3 - # of populations/areas in greatest need consumers who were	#1: 3.3 - Other #/% of new OC clients that receive new consumer packet with Alert Iowa	#1: 3.3 - Other #/% of new OC clients that complete an Alert

	What We Do	How Well We Do It	Is Anyone Better Off?
	<p>referred to further develop an individual emergency plan.</p> <p>#2: 3.3 - Total # of caregivers who were referred to resources to further develop an individual emergency plan for the person they provide care for.</p> <p>#3: [Choose an item.]</p>	<p>information/or receive an Alert Iowa referral.</p> <p>#2: 3.3 - Total # of caregivers who developed an individual emergency plan for the person they provide care for.</p> <p>#3: Choose an item.</p>	<p>Iowa Registration through Heritage</p> <p>#2: 3.3 - #/% of caregivers of populations/areas in greatest need consumers who indicate they feel more prepared to provide care during disaster and emergency situations.</p> <p>#3: Choose an item.</p>
SFY 2026 Targets	<p>#1: 250 OC clients will receive information on Alert Iowa (general aging and caregiver OC clients)</p> <p>#2: 20 Caregiver case management clients will be educated on the Disaster PrepWise program for emergency planning</p> <p>#3: Click or tap here to enter text.</p>	<p>#1: 100% of OC clients will receive information on Alert Iowa (general aging and caregiver OC clients)</p> <p>#2: 10 Caregiver case management clients will be referred to the Disaster PrepWise program for possible interventions</p> <p>#3: Click or tap here to enter text.</p>	<p>#1: 10 OC clients will complete Alert Iowa registration through Heritage.</p> <p>#2: 5 Caregiver case management clients will participate in the Disaster PrepWise intervention</p> <p>#3: Click or tap here to enter text.</p>

- **Explanation of Other Measure (if selected):**
Heritage will track all Alert Iowa registration forms distributed and will track how many OC clients sign up. Heritage will report this data to Linn County Emergency Management Agency (EMA) and the other EMA in the region.
- **Explanation of logic used to develop SFY 2026 targets:**
Targets for FY26 are based on planned activities for this strategy. These will be new activities, thus projections are based on anticipated success of the strategy and planned ability to track this information.

Statewide Performance Measures

Measure	Outcome	FY2025 Target	FY2025 Results as of 12/31/2024	FY2026 Target
#/% of EAPA assessment and intervention consumer cases closed with services no longer needed.	To evaluate resolution rate for a consumer's abuse, neglect, or exploitation situation.	Number: Click or tap here to enter text. Percentage: 85%	Number: 82 closed successfully Percentage: 77%	Number: 85 closed successfully Percentage: 85%
#/% of EAPA consultation consumers whose needs are met through provider referrals for Self-Advocacy.	To evaluate whether consumers are able to use information and referrals for self-advocacy in resolving abuse, neglect, or exploitation situation.	Number: Click or tap here to enter text. Percentage: 85%	Number: 50 needs met Percentage: 82%	Number: 60 needs met Percentage: 85%

Goal 4: Stay Engaged and Supported

People with disabilities and older adults are supported by formal and informal caregivers of their choice and have social connections within their communities.

Agency Programs, Services & Initiatives

During the Community Needs Assessment, Heritage identified gaps in caregiver services in rural counties as shown by the data on page 59. Through this, the agency also recognizes a need to reach more caregivers, especially at-risk rural caregivers that would benefit from education and/or services.

Caregivers provide an immense amount of “free” care for their care recipient that if left to public funding sources like Medicaid would cost the State millions. According to AARP’s [“Valuing the Invaluable”](#) series, “Care provided by millions of unpaid family caregivers across the U.S. was valued at \$600 billion in 2021... a \$130 billion increase in [unpaid contributions from the 2019 report](#). The staggering figure is based on about 38 million caregivers providing an average of 18 hours of care per week for a total of 36 billion hours of care, at an average value of \$16.59 per hour.” Without their contribution, social systems would collapse and institutionalization would be the only option for older adults.

Caregiving is more demanding than ever and strains all aspects of a caregiver's life: physical, mental and financial. In addition to the care recipient needs, caregivers themselves need to be taken care of. If their health needs are ignored, they are unable to continue to provide these critical services to their care recipient. Stress and financial burden add to their strain. These strains can be reduced by providing support through respite, education and supplemental services.

Current trends:

1. Most people providing care often do not consider themselves caregivers. People often suffer through associated health declines like stress and loneliness due to the burden of caregiving. Support systems make all the difference for caregivers. With access to resources like respite care, support groups, and education, caregivers feel less isolated and more equipped to manage their responsibilities. Emotional support from peers and professionals provides a safe space to share struggles and learn from others facing similar challenges. Practical resources such as workshops and training help caregivers build the skills they need to navigate complex situations with confidence.

2. Caregivers need to take better care of themselves. Support that addresses the caregiver's health and that of the care recipient is essential to preventing premature institutionalization and lengthening an individual's ability to stay in their home setting of choice. In addition, many caregivers are still working outside the home or are caring for their own children or grandchildren as well. These caregivers have additional and unique needs as they have obligations to their employer, families and the care recipient. To empower working caregivers to remain in the workforce is essential to relieving a caregiver's stress and financial burden. Heritage is committed to addressing barriers and challenges impacting caregivers' ability to safely, effectively, and reliably provide care. Examples include adult day care, grocery delivery, respite and more.

Heritage recognizes there is a tool in Wellsky that will measure caregiver stress. However, not all staff are educated in what the data tells them and what, if any, interventions should be offered. Heritage would like to better utilize this tool or identify another that would help indicate service options to incorporate into the consumers' goals. Strain levels and a measurement can help the agency prioritize services and set guidelines for the provision of additional services, such as respite.

3. Caregivers and the general public need to be more educated on caregiving's

challenges and barriers. The National Alzheimer's Association identifies Alzheimer's Disease and dementia as a growing public health issue. Heritage is committed to supporting caregivers by evaluating current program offerings and possibly offering new caregiver education programs. The virtual Caregiver 101 series will continue and will be reassessed for in-person options. The annual Caregiver Wellness Day is also considering a new format that would expand to an extra county, allowing more caregivers to attend. Lastly, three Heritage staff are certified to deliver Dementia Friends trainings that teach attendees how to best help people living with dementia and their caregivers in everyday situations.

4. More services for caregivers are needed. Heritage currently offers the following caregiver services: caregiver information & assistance, caregiver options counseling, caregiver case management, caregiver education, caregiver supplemental services, and respite (in- and out-of-home).

5. Heritage needs to develop more referral partnerships in the region by educating healthcare, businesses and other organizations regarding our services and the referral process. This will enable Heritage to offer more comprehensive services to caregivers and their care recipients.

Heritage is proud to partner with a number of adult day care health centers and respite providers in the region, but recognizes that more service providers are needed in rural areas. Services can be unaffordable to many. Hourly costs for in-home respite range from \$35-95 per hour, with most having a four-hour minimum. Caregivers are incredibly busy and do not have the luxury of time to research what is available in their community. This is why Heritage's caregiver information & assistance and options counseling services are so important. Heritage staff help caregivers navigate the complicated process of accessing services that through the VA, Long Term Care Insurance, Medicare, Medicaid and private pay.

Heritage also partners with many local service providers and non-profits to plan and present the annual Caregiver Wellness Day. Each of the past several events have reached capacity for registration. Event costs are covered by sponsorships from local service providers, businesses and financial institutions.

A current typical consumer served by Heritage: All caregivers we served with ***caregiver options counseling*** were over the age of 60 (100%) and were typically White (96%) and female (77%). Caregivers in FY2024 needing long-term support via ***caregiver case management*** were all age 60 years or over (100%), White (81%) and female (74%). Heritage provides a variety of informal caregiver supports.

Listed below are services provided to caregivers in FY2024 by Heritage and our funded partners.

Caregiver information & assistance – 556 consumers received 911 units of service.

Caregiver options counseling – 128 consumers received 622 units of service.

Caregiver case management – 27 consumers received 290 units of service.

Caregiver counseling – 11 consumers received 21 units of service.

Caregiver respite care: in-home – 113 consumers received 6,757 hours of service.

Caregiver respite care: out-of-home – 23 consumers received 5,300 hours of service.

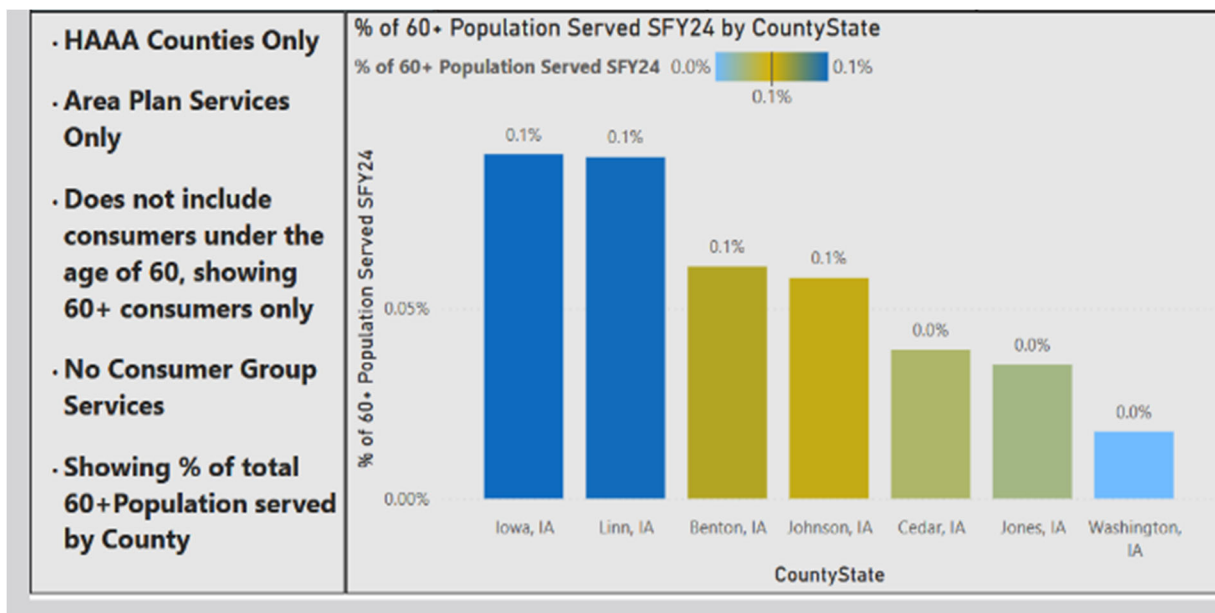
Caregiver supplemental services – 20 consumers received 437 unit of service. ##

Objective #1: 4.2: Ensure services and supports are available to informal caregivers in underserved areas.

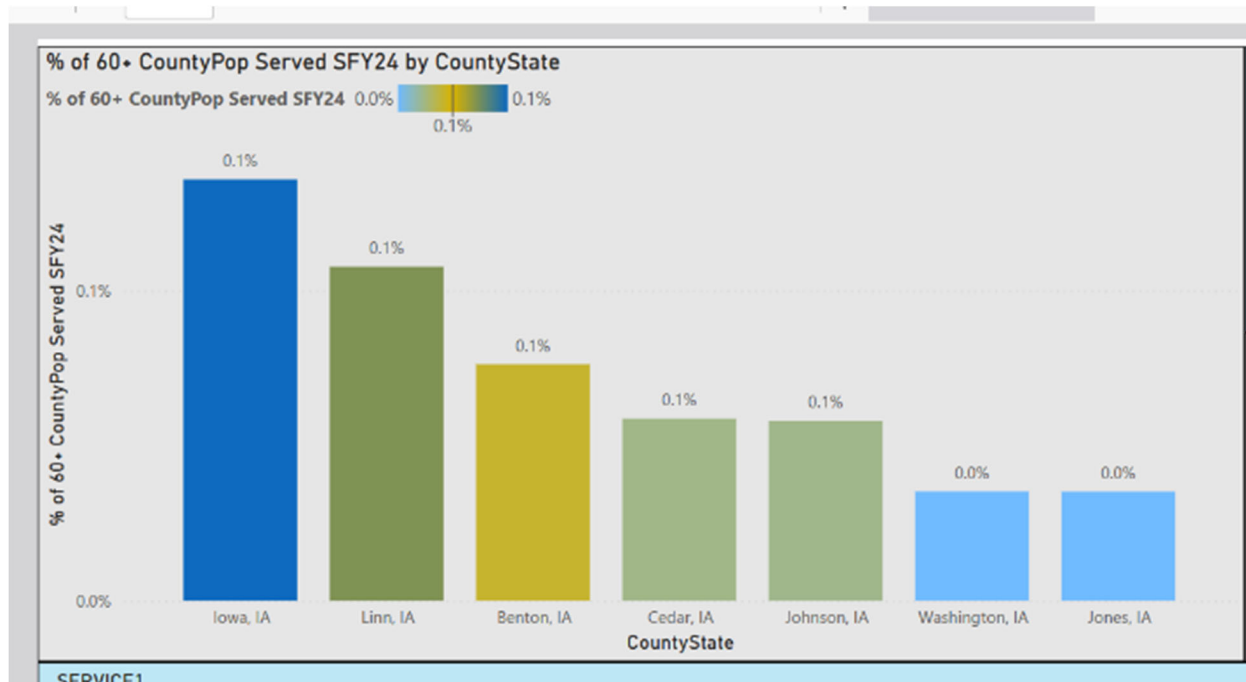
Why it matters...

Heritage's desired outcome is to serve more caregivers in the gap areas of our region with caregiver options counseling and caregiver case management.

The first chart below shows caregiver options counseling number of consumers served and percentage of 60+ populations served by county.



The chart below shows caregiver options counseling and caregiver case management consumers by county and demonstrates that Jones and Washington counties are least served.



What we are doing...

Strategy: 4.2a - Develop or strengthen partnerships to increase referrals of informal caregivers of populations/areas in greatest need to OAA Caregiver/ORC services.

- Explanation for Other Strategy (if selected):
n/a

Activities:

- Heritage will focus on outreach to caregivers with particular attention to Jones County as that is the lowest served county for caregiver options counseling.
- Heritage will develop outreach kits for service providers that come in contact with caregivers in Jones and Washington counties.
- Heritage will provide a flyer describing caregiver information & assistance services and how we can help caregivers with stress, strain and financial burden.

- We will send this flyer to area doctor's offices, law enforcement, faith leaders and subcontractors.
- The flyer will offer to send additional materials in the form of our outreach kits by request. When we are called for the outreach kit, we will offer to speak to their organization and answer any questions about services.
- Heritage will provide outreach kits at the annual mandatory subcontractor meeting and present on the caregiver services. This will help subcontractors share knowledge with their consumers' caregivers and make appropriate referrals.
- Heritage will present on the Caregiver Support Program at Encore Express in Washington, Iowa.
- Heritage will request the opportunity to present on the Caregiver Support Program at our Jones County congregate dining sites and to send flyers via home delivered meals.
- Heritage will add a question to the annual caregiver satisfaction survey learn how consumers learned of our services and solicit ideas for more outreach.
- Heritage will offer a Zoom presentation on the Caregiver Support Program at least twice in the fiscal year.

Populations in Greatest Economic Need: Persons 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): Caregivers who are older individuals with greatest economic need and older individuals with greatest social need

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Based on maps, data of those previously served and our Community Needs Assessment, Heritage shows gaps in the rural areas of Washington, Cedar, Jones and Benton counties. Washington and Jones will be focus on the first year of the area plan, with the following years anticipated to expand to the other counties identified. This will

be Heritage's area of focus to increase referrals to the caregiver information and assistance program. Caregiver information and assistance is the entry point to all other caregiver services and is easy to explain, thus the program is most appropriate for community education. If caregiver information and assistance increases, caregiver options counseling should also increase. We will focus our outreach to doctor's offices, non-profit agencies, home health providers and subcontractors.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	<p>#1: 4.2 - Total # of caregivers who are referred to Caregiver/ORC Options Counseling.</p> <p>#2: 4.1 - Other (Please explain.)</p> <p>#3: [Choose an item.]</p>	<p>#1: 4.2 - #/% of caregivers who live in underserved areas who enrolled in Caregiver/ORC Options Counseling.</p> <p>#2: 4.1 - Other (Please explain.)</p> <p>#3: [Choose an item.]</p>	<p>#1: 4.2 - #/% of caregivers with care recipient enrolled in at least one or more OAA services.</p> <p>#2: 4.2 - #/% of caregivers who live in underserved areas who are enrolled in Caregiver/ORC Options Counseling and completed care plan goals within three months of service.</p> <p>#3: [Choose an item.]</p>
SFY 2026 Targets	<p>#1: Increase caregiver options counseling referrals by 5% compared to FY25.</p> <p>#2: Increase in caregivers receiving caregiver information and assistance by 15% in Jones and Washington counties.</p> <p>#3: Click or tap here to enter text.</p>	<p>#1: Increase by 10% caregiver options counseling in Jones and Washington counties compared to FY25.</p> <p>#2: 80% of caregivers report receiving the information they need through caregiver information and assistance.</p> <p>#3: Click or tap here to enter text.</p>	<p>#1: Increase by 5% compared to FY25.</p> <p>#2: 75% of caregivers residing in Jones and Washington counties who are admitted to caregiver options counseling complete their care plan goals within 90 days of admission.</p> <p>#3: Click or tap here to enter text.</p>

- **Explanation of Other Measure (if selected):**
 #1 - Total # of caregivers receiving caregiver information and assistance. If caregiver information & assistance increases, in turn, caregiver options counseling, more caregivers in our Focus Area should also be enrolled in services and overall, more caregivers enrolled in at least one or more OAA services should also increase
 #2 – % of those receiving caregiver information and assistance report that they received the information they were looking for.
- **Explanation of logic used to develop SFY 2026 targets:**
 Targets were selected based on the previous year data and planned activities.

Objective #2: 4.3: Identify informal caregivers are experiencing or at risk for stress, depression, and financial cost burden due to their caregiver role.

Why it matters...

Heritage's desired outcome is to better identify and measure positive impact on caregivers experiencing high risk of caregiver stress.

There are many articles and studies from the Mayo Clinic, AARP, USAging and more that recognize caregiving as one of the most rewarding yet stressful things an informal caregiver can take on. Heritage sees this daily in our work with caregivers that report many emotional and financial burdens. While Heritage does not have data to represent this objective at this time, we will work with Wellsky to pull this data going forward to measure impact and success.

What we are doing...

Strategy: 4.3f - Implement validated screening tools to screen and intervene for caregivers at greatest risk.

- **Explanation for Other Strategy (if selected):**
n/a

Activities:

1. Heritage will train staff to use the Stress/Strain measure tool in Wellsky
2. Heritage will assess this tool and data generated after six months. We will determine

what information we would like from a tool and identify if another tool would work better.

3. Heritage will carefully assess if the tool(s) captures what we are hearing from caregivers regarding stress levels. Some tools generate a number, but that number may not tell the full story. Thus, we will determine if this tool is giving us the information needed from the data we identified as desired.

4. Heritage will draft a plan for how such data should be used in prioritizing funding for those in need of supplemental services or respite assistance.

Populations in Greatest Economic Need: Persons 60+ who identify as low-income (up to 300% of the Federal poverty level)

- Explanation of Other or Sub Population (if selected.):
n/a

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): Caregivers who are experiencing or at-risk for stress, depression, and financial cost burden due to their caregiver role

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Heritage will focus on documenting that caregiver services improve outcomes for caregivers experiencing stress, depression and financial burden due to their caregiver role. We will use this data to better inform our prioritization processes in funding of person-centered services, management of staff caseloads and potential wait lists for case management.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 4.3 - #/% of caregivers who completed the caregiver assessment. #2: [Choose an item.] #3: [Choose an item.]	#1: 4.3 - #/% of caregivers who are considered at-risk and are also enrolled in Caregiver/ORC Options Counseling. #2: [Choose an item.] #3: [Choose an item.]	#1: 4.3 - #/% of caregivers who indicate their stress, depression, and/or financial cost burden due to their caregiver role has been reduced after receiving Caregiver/ORC services. #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: 95% of caregivers to complete the assessment. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Increase caregivers receiving any caregiver service by 10% compared to FY25. #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Increase the % of improvement on caregivers stress/strain score by 10% compared to FY25. #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure (if selected):

n/a

- Explanation of logic used to develop SFY 2026 targets:

Targets are based off the previous year data. We want to see an increase in the assessments fully completed and an increase in evaluation of the stress/strain score to determine if the current tools effectively provide our desired information. This data must be complete and evaluated to create prioritization guidelines and funding allocation decisions that support individual caregivers in their care plan through supportive services and respite assistance.

Objective #3: 4.4: Strengthen and enhance the dementia capability of the aging and disability network.

Why it matters...

The desired outcome of this strategy is to increase the dementia capability in our region through education and staff training.

Dementia and related disorders are a public health concern, as they are one of the leading causes of disability in older adults and are being diagnosed more frequently in younger seniors. These disorders significantly impact caregiver stress, burden and financial strain.

Heritage has little information on how many people in our region are trained through programs such as Dementia Friends, but know that we need more. Three Heritage staff are Dementia Champions, meaning they are certified to provide Dementia Friends trainings. We plan to use this program and other strategies to increase our region's dementia capability.

What we are doing...

Strategy: 4.4c - Provide training to key community partners to increase referrals of caregivers who care for persons with Alzheimer's disease and related disorders with neurological and organic brain dysfunction to Caregiver/ORC services.

- Explanation for Other Strategy (if selected):
n/a

Activities:

1. Heritage will implement pre/post-tests as much as possible to measure the impact of our caregiver trainings on the region's dementia capability.
2. Heritage will use Caregiver Wellness Day to evaluate the need for additional dementia education.
3. Heritage will offer at least five Dementia Friends classes in the fiscal year.
4. Heritage will encourage subcontractors to go through the Dementia Friends training and offer this training either within or after the annual mandatory subcontractor meeting.
5. Heritage will train all Heritage dining site managers on Dementia Friends. This will be a mandatory training for them.
6. Heritage will evaluate Powerful Tools for Caregiver classes for oversaturation in our

region. If oversaturated, we will identify another caregiver program that we can offer. If another program will be offered, we will identify what steps are needed to implement this program by the end of FY26. Our target will be to offer our first class by FY27 if appropriate.

7. Heritage will train our Board of Directors in Dementia Friends every other year. Encore Café volunteers will be trained on Dementia Friends by the end of FY26.

8. Heritage will develop an outreach plan with timelines to offer Dementia Friends program to other community partners such as municipality staff, transportation providers to older adults, churches, doctor's offices and businesses.

9. Heritage will prioritize efforts to rural counties as caregivers in our rural areas are documented as the most underserved in our region.

10. All Heritage staff will receive training on Dementia Friends annually. Management will also explore additional training for care team on dementia and best practices in person centered care when working with an individual with dementia and/or their caregivers.

Populations in Greatest Economic Need: Other (Please explain.)

- Explanation of Other or Sub Population (if selected.):
Individuals with dementia and their caregivers, regardless of income

The population Heritage strives to meet in this strategy are community individuals with dementia of all incomes that interact with caregivers to increase our dementia response capability.

Populations in Greatest Social Need: Persons 60+ living in rural and underserved areas

- Explanation of Other or Sub Population (if selected.):
n/a

Family Caregivers in Greatest Need (if applicable): Caregivers who provide care for individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction

- Explanation of Other or Sub Population (if selected.):
n/a

Area(s) of Focus:

Heritage will focus efforts on increasing dementia capability in the region by educating subcontractors and caregivers. We will prioritize underserved rural counties.

How we measure impact...

	What We Do	How Well We Do It	Is Anyone Better Off?
Measures	#1: 4.1 - Other (Please explain.) #2: [Choose an item.] #3: [Choose an item.]	#1: 4.1 - Other (Please explain.) #2: [Choose an item.] #3: [Choose an item.]	#1: 4.2 - Other (Please explain.) #2: [Choose an item.] #3: [Choose an item.]
SFY 2026 Targets	#1: Heritage offer at least 15 caregiver education training opportunities #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: Heritage will have trained at least 350 individuals #2: Click or tap here to enter text. #3: Click or tap here to enter text.	#1: 75% of those trained report that they feel more capable in supporting a caregiver of someone with dementia at a minimum level #2: Click or tap here to enter text. #3: Click or tap here to enter text.

- Explanation of Other Measure (if selected):

What We Do - Heritage will measure the number of Dementia Friends or other caregiver education trainings offered.

How Well We Do It - # of individuals trained in the fiscal year

Is Anyone Better Off - # of people that report feeling more capable of offering support to a caregiver after the training

- Explanation of logic used to develop SFY 2026 targets:

Targets are based on planned activities and desired attendance. In addition, with 3 people trained in Dementia Friends vs. the current one, our capacity will increase.

Statewide Performance Measures

Measure	Purpose	FY2025 Target	FY2025 Results as of 12/31/2024	FY2026 Target
#/% of congregate meal consumers served who may be socially isolated, percentage eating four meals at a congregate meal site in a month.	To determine whether congregate meal consumers who may be socially isolated have the opportunity to socialize in their community.	Number: Click or tap here to enter text. Percentage: 95%	Number: 1,482 Percentage: 51%	Number: 1,500 Percentage: 50%
#/% of home delivered meal consumers served who may be socially isolated, percentage receiving at least eight meals in a month.	To determine whether home delivered meal consumers who may be socially isolated receive regular contact with a meal delivery person.	Number: Click or tap here to enter text. Percentage: 95%	Number: 6,236 Percentage: 97%	Number: 6,230 Percentage: 97%
#/% of caregiver consumers indicating caregiver counseling and/or respite care service allowed them to maintain their caregiver role.	To determine whether case management and respite services provide caregivers the supports and services they need to continue to provide informal care to care recipients.	Number: Click or tap here to enter text. Percentage: 75%	Number: 18 Percentage: 95%	Number: 20 Percentage: 95%

Section 2: Service Projections

SFY 2026 Projected Consumers and Service Units

[Insert a copy of your agency's Form 3A-1]

Service		Service Units Provided	Consumers Served	60+ Rural	60+ Minority	60+ Minority Below Poverty	60+ Below Poverty
1: Personal Care	Gen. Aging	40	4	0	0	0	0
2: Homemaker	Gen. Aging	100	6	2	0	0	1
3: Chore	Gen. Aging	2,851	68	0	4	4	21
4: 60+ Home Delivered Nutrition	Gen. Aging	242,347	1,687	462	70	41	513
5: Adult Daycare/Health	Gen. Aging	7,032	25	5	0	0	2
6: 60+ Case Management	Gen. Aging	1,244	102	19	5	3	38
7: 60+ Congregate Nutrition	Gen. Aging	51,149	1,501	469	9	8	120
8: Nutrition Counseling	Gen. Aging	100	75	16	4	4	13
9: Assistive Transportation	Gen. Aging	944	75	50	0	0	18
10: Transportation	Gen. Aging	3,405	195	28	6	3	42
11: Legal Assistance	Gen. Aging	1,041	560	0	0	0	0
12: Nutrition Ed.	Gen. Aging	18,200	2,336	576	74	40	565
13: 60+ Information & Assistance	Gen. Aging	3,507	1,639	210	53	20	213
14: Outreach	Gen. Aging	1,500	1,500	0	0	0	0
B02: Health Promotion: Non Evidence	Gen. Aging	10	5	1	1	1	1
B04: 60+ Emergency Response System	Gen. Aging	202	27	6	0	0	9
B05: Behavioral Health Supports	Gen. Aging						
B07: Health Promo: Evidence Based	Gen. Aging	125	125	6	1	0	3
C07: EAPA Consultation	Gen. Aging	204	125	29	5	0	21
C08: EAPA Assess & Intervention	Gen. Aging	1,866	219	44	8	2	51
C09: EAPA Training & Education	Gen. Aging	15	177	0	0	0	0
D01: Training & Education	Gen. Aging	120	103,515	0	0	0	0
E05: 60+ Options Counseling	Gen. Aging	1,402	267	32	19	8	57
A01: 60+ Material Aid: Home Mod./Repairs	Gen. Aging	12	12	0	0	0	0
F06: 60+ Material Aid: Asst. Tech./Durable Med. Equip.	Gen. Aging	24	24	3	0	0	0
F07: 60+ Material Aid: Consumable Supplies	Gen. Aging	2,572	64	1	2	2	8
F08: 60+ Material Aid: Other	Gen. Aging	44	32	0	0	0	0
CG3: FC Counseling	Caregiving	25	25	6	0	0	2
CG4: FC Information Services	Caregiving	19	550	0	0	0	0
CG7: FC Home Delivered Nutri.	Caregiving						
CG8: FC Options Counseling	Caregiving	770	165	15	2	0	3
CG9: FC Case Management	Caregiving	351	33	9	2	0	3
CG10: FC Information & Assistance	Caregiving	1,031	533	113	9	3	41
CG11: FC Support Groups	Caregiving						
CG12: FC Training	Caregiving						
CG13: FC Congregate Nutri.	Caregiving						
CG14: FC Emergency Resp. Sys.	Caregiving						
CG27: FC Supplemental Services: Asst. Tech./Durable Med. Equipment	Caregiving						

Service		Service Units Provided	Consumers Served	60+ Rural	60+ Minority	60+ Minority Below Poverty	60+ Below Poverty
CG15: FC Supplemental Services: Consumable Supplies	Caregiving						
CG22: FC Supplemental Services: Other	Caregiving	168	5	2	0	0	3
CG23: FC Respite Care: In Home	Caregiving	5,922	90	9	2	0	3
CG24: FC Respite Care: Out-of-Home (Day)	Caregiving	3,247	25	3	0	0	2
CG25: FC Respite Care: Out-of-Home (Overnight)	Caregiving						
CG26: FC Respite: Other	Caregiving						
GO3: ORC Counseling	Caregiving						
GO4: ORC Information Services	Caregiving						
GO7: ORC Home Delivered Nutrition	Caregiving						
GO8: ORC Options Counseling	Caregiving						
GO9: ORC Case Management	Caregiving						
GO10: ORC Information & Assistance	Caregiving						
GO11: ORC Support Groups	Caregiving						
GO12: ORC Training	Caregiving						
GO13: ORC Congregate Nutri.	Caregiving						
GO14: ORC Emergency Response System	Caregiving						
GO27: ORC Supplemental Services: Asst Tech/Durable Med Equipment	Caregiving						
GO15: ORC Supplemental Services: Consumable Supplies	Caregiving						
GO22: ORC Supplemental Services: Other	Caregiving						
GO23: ORC Respite Care: In-Home	Caregiving						
GO24: ORC Respite Care: Out-of-home (Day)	Caregiving						
GO25: ORC Respite Care: Out-of-home (Overnight)	Caregiving						
GO26: ORC Respite Care: Other	Caregiving						

SFY 2026 Service Coverage

Information & Service Assistance Services

Please indicate with an “X” the services offered within each of your PSA counties.

Services	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
60+ Case Management	X	X	X	X	X	X	X
FC Case Management	X	X	X	X	X	X	X
ORC Case Management							
FC Counseling	X	X	X	X	X	X	X
ORC Counseling							
EAPA Assessment & Intervention	X	X	X	X	X	X	X
Information & Assistance (general)	X	X	X	X	X	X	X
FC Information & Assistance	X	X	X	X	X	X	X
ORC Information & Assistance							
EAPA Consultation	X	X	X	X	X	X	X
Legal Assistance	X	X	X	X	X	X	X
60+ Options Counseling	X	X	X	X	X	X	X
FC Options Counseling	X	X	X	X	X	X	X
ORC Options Counseling							

Nutrition & Health Promotion Services

Please indicate with an “X” the services offered within each of your PSA counties.

Services	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
60+ Congregate Nutrition	X	X	X	X	X	X	X
FC Congregate Nutrition							
ORC Congregate Nutrition							
Health Promotion: Evidence-Based	X	X	X	X	X	X	X
Health Promotion: Non Evidence-Based	X	X	X	X	X	X	X
60+ Home Delivered Nutrition	X	X	X	X	X	X	X
FC Home Delivered Nutrition							
Nutrition Counseling	X	X	X	X	X	X	X
Nutrition Education	X	X	X	X	X	X	X

Services to Promote Independence

Please indicate with an "X" the services offered within each of your PSA counties.

Services	Benton	Cedar	Iowa	Johnson	Jones	Linn	Washington
Adult Day Care / Health	X	X	X	X	X	X	X
Assisted Transportation	X	X	X	X	X	X	X
Behavioral Health Supports							
Chore	X	X	X	X	X	X	X
60+ Emergency Response System	X	X	X	X	X	X	X
FC Emergency Response System							
ORC Emergency Response System							
Homemaker	X	X	X	X	X	X	X
FC Information Services	X	X	X	X	X	X	X
ORC Information Services							
60+ Material Aid – Types:							
• Assistive Tech/Durable Medical Equipment	X	X	X	X	X	X	X
• Consumable Supplies	X	X	X	X	X	X	X
• Home Modification/Repairs	X	X	X	X	X	X	X
• Other	X	X	X	X	X	X	X
FC Supplemental Services – Types:							
• Assistive Tech/Durable Medical Equipment	X	X	X	X	X	X	X
• Consumable Supplies	X	X	X	X	X	X	X
• Other	X	X	X	X	X	X	X
ORC Supplemental Services Types:							
• Assistive Tech/Durable Medical Equipment							
• Consumable Supplies							
• Other							
Outreach	X	X	X	X	X	X	X
Personal Care	X	X	X	X	X	X	X
Caregiver Respite							
• FC Respite Care: In-Home	X	X	X	X	X	X	X
• ORC Respite Care: In-Home							
• FC Respite Care: Out-of-Home (Day)	X	X	X	X	X	X	X
• ORC Respite Care: Out-of-Home (Day)							
• FC Respite Care: Out-of-Home (Overnight)							
• ORC Respite Care: Out-of-Home (Overnight)							
• FC Respite: Other							
• ORC Respite: Other							
CG Support Group							
ORC Support Group							
Training & Education	X	X	X	X	X	X	X
FC Training	X	X	X	X	X	X	X
ORC Training							
EAPA Training & Education	X	X	X	X	X	X	X
Transportation	X	X	X	X	X	X	X

Self-Direction Service Delivery

☒ Agency does **not** use a self-direction service delivery approach to providing services to older adults and/or caregivers.

OR

☐ Agency uses a self-direction service delivery approach to providing services to older adults and/or caregivers. Please provide a list below of services that are delivered using a self-directed services delivery approach.

[Click or tap here to enter text.](#)

The following table shows the number of persons expected to be served using a self-direction service delivery approach and the amount of funds by funding source projected to be expended under this service delivery approach.

Item	Projection
Persons Served - Older Adult	[Enter #]
Projected Title IIIB Expenditure - Older Adults	[Estimated \$]
Projected Other - State Expenditure - Older Adults	[Estimated \$]
Projected Other - Non-State Expenditure - Older Adults	[Estimated \$]
Projected Program Income Expended - Older Adults	[Estimated \$]
Persons Served - Caregivers of Older Adult	[Enter #]
Projected Title IIIE Expenditure - Caregivers Older Adult	[Estimated \$]
Projected Other - State Expenditure -Caregivers Older Adult	[Estimated \$]
Projected Other - Non-State Expenditure - Caregivers Older Adult	[Estimated \$]
Projected Program Income Expended -Caregivers Older Adult	[Estimated \$]
Persons Served - Older Relative Caregivers	[Enter #]
Projected Title IIIE Expenditure - Older Relative Caregivers	[Estimated \$]
Projected Other - State Expenditure --Older Relative Caregivers	[Estimated \$]
Projected Other - Non-State Expenditure - Older Relative Caregivers	[Estimated \$]
Projected Program Income Expended - Older Relative Caregivers	[Estimated \$]

Caregiver Respite Voucher

☒ Agency does **not** use a voucher method for caregivers to obtain respite services.

OR

☐ Agency uses a voucher method for caregivers to obtain respite services.

The following table shows the number of persons expected to be served using a voucher method for caregiver respite and which funding sources are expected to be utilized for the vouchers.

Item	Projection
Persons Served - Caregivers of Older Adults	[Enter #]
Does AAA intend to use the funding sources listed below to provide respite services for Caregivers of Older Adults through vouchers?	
OAA Title III E federal funds	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Other - State Expenditure	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Other - Non-State Expenditure	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Program Income Expended	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Persons Served - Older Relative Caregivers	[Enter #]
Does AAA intend to use the funding sources listed below to provide respite services for Older Relative Caregivers through vouchers?	
OAA Title III E federal funds	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Other - State Expenditure	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Other - Non-State Expenditure	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Program Income Expended	<input type="checkbox"/> Yes or <input type="checkbox"/> No

Evidence-Based Programming (EBP)

EBP Definition

Administration for Community Living's definition of Evidence-Based Programs:

- Demonstrated through evaluation to be effective for improving the health and well-being or reducing disease, disability and/or injury among older adults; *and*
- Proven effective with older adult population, using Experimental or Quasi-Experimental Design;* *and*
- Research results published in a peer-review journal; *and*
- Fully translated** in one or more community site(s); *and*
- Includes developed dissemination products that are available to the public.

**Experimental designs use random assignment and a control group. Quasi-experimental designs do not use random assignment.*

***For purposes of the Title III-D definitions, being “fully translated in one or more community sites” means that the evidence-based program in question has been carried out at the community level (with fidelity to the published research) at least once before. Sites should only consider programs that have been shown to be effective within a real-world community setting.*

Within the table below, please list the EBP you intend to offer in SFY 2026 along with the methods in which you are planning to deliver the service.

Name of Program	Description of location(s) where program will be offered.	Method(s) for Service Delivery
Walk with Ease	In Iowa City outside in Spring	<input type="checkbox"/> Virtual <input checked="" type="checkbox"/> In-Person
Matter of Balance	In Iowa City at the Iowa City Senior Center	<input type="checkbox"/> Virtual <input checked="" type="checkbox"/> In-Person
Tai Chi	Offered throughout the Heritage region in libraries, condo recreations rooms, churches, senior apt group rooms, City Recreations Centers etc.	<input type="checkbox"/> Virtual <input checked="" type="checkbox"/> In-Person
Powerful Tools for Caregivers	Offered virtually several times in calendar year. Also held in person.	<input checked="" type="checkbox"/> Virtual <input checked="" type="checkbox"/> In-Person
		<input type="checkbox"/> Virtual <input type="checkbox"/> In-Person
		<input type="checkbox"/> Virtual <input type="checkbox"/> In-Person

Area Plan Service Waiting List

☐ Agency **does not** anticipate a waiting list for any services in SFY 2026.

OR

☒ Agency **anticipates** a waiting list for services in SFY 2026 as indicated in the following table. *Please provide additional information with the table below.*

Service(s) with Waiting List	Please select reason(s) for anticipating waiting list.	Estimated Number of Individuals on Waiting List
Home Delivered Meals	<input checked="" type="checkbox"/> Funding Inadequate <input type="checkbox"/> No Funding <input type="checkbox"/> No Service Provider <input type="checkbox"/> Unable to Staff <input type="checkbox"/> Other (please describe):	Heritage anticipates. Have not determined yet.
Congregate Meals	<input checked="" type="checkbox"/> Funding Inadequate <input type="checkbox"/> No Funding <input type="checkbox"/> No Service Provider <input type="checkbox"/> Unable to Staff <input type="checkbox"/> Other (please describe):	Heritage anticipates. Have not determined yet.
Nutrition Counseling	<input checked="" type="checkbox"/> Funding Inadequate <input type="checkbox"/> No Funding <input type="checkbox"/> No Service Provider <input type="checkbox"/> Unable to Staff <input type="checkbox"/> Other (please describe):	Heritage anticipates. Have not determined yet.
Case Management	<input checked="" type="checkbox"/> Funding Inadequate <input type="checkbox"/> No Funding <input type="checkbox"/> No Service Provider <input type="checkbox"/> Unable to Staff <input type="checkbox"/> Other (please describe):	Heritage anticipates. Have not determined yet.

Please refer to the SFY 2026 Reporting Manual for instructions on how to document and notify ADS when implementing a waiting list.

Title III and Title VI Coordination and Tribal Elders and Family Caregivers Outreach Activities

☒ Area Agency on Aging does not have a Title VI program within their planning and service area.

- Please describe how the agency intends to reach out to Native Americans with Title III services within the agency's Planning and Services Area.

Click or tap here to enter text.

OR

☐ Area Agency on Aging has a Title VI program within their planning and service area. If so, please provide responses to the questions below.

1. Describe how your AAA has developed policies and procedures in coordination with the Title VI program director located in your planning and service area.

Click or tap here to enter text.

2. How does your AAA, including contact service providers, provide outreach to Tribal elders and family caregivers regarding service for which they may be eligible under Title III?

Click or tap here to enter text.

3. What communication opportunities does the AAA make available to Title VI programs, to include Title III and other funding opportunities, technical assistance on how to apply for Title III and other funding opportunities, meetings, email distribution lists, presentations, and public hearings?

Click or tap here to enter text.

4. Describe how Title VI programs may refer individuals who are eligible for Title III services.

Click or tap here to enter text.

5. Describe how the AAA plans to include the Title VI program director in emergency planning.

Click or tap here to enter text.

Section 3: Quality Management

There are currently four main strategies to our overall quality management efforts:

1. Quality Assurance and Improvement Program. The purpose of the Quality Assurance and Improvement Program (QAIP) is to provide a formal process by which Heritage evaluates and identifies any need for improvement or adjustment in agency operations, service delivery, and/or community impact. Below are measures that are taken to ensure our agency and subcontractors are reporting information accurately, providing quality services and meeting our performance measures.

- Reports on the number of missing intakes, assessments, activities and service delivery units are compiled on a monthly basis to ensure staff and subcontractors have completed all reporting requirements in WellSky.
- Management team reviews progress towards consumers served, units delivered, subcontract spenddown, and performance outcomes on a monthly basis. Quarterly percentages of 25%, 50% and 75% are used as benchmarks to determine if an adjustment to allocation/service delivery is needed.
 - Based on quarterly benchmarks, if service providers are projected to over spend or under deliver on units we follow-up with providers to understand if an adjustment needs to be made with their allocation.
 - If a service provider is needing additional funding to account for an increase in service delivery needs or is needing less funding due to decreased service needs, Heritage is able to shift the funding to where it's needed most.
 - Any adjustments that are made are reviewed by the entire management team and approved by the Executive Director before taking action.
- Staff reviews service trends and community engagement activities on a quarterly basis to assess to modify outreach efforts and increase service utilization in underserved areas.
- Heritage mails out participant satisfaction surveys on an annual basis for activities carried out under the area plan. Results are reviewed and improvements to services are made as needed.

2. Statewide Collaborations. Heritage has been working with state partners to improve consistency in quality measures through i4a and Iowa Department on Aging quarterly conversations and workgroups.

3. Internal Controls. Heritage has assigned Contract Monitors and Grant Managers. The contract monitor is responsible for the monitoring and assessing of the program and subcontractor compliance and performance. This includes written monitoring reports at least quarterly, obtaining participant views and an on-site assessment report at least annually. The role of a Grant Manager is to ensure that

Heritage fulfills all obligations of the grant through program activity coordination and achieving grant deliverables.

4. Volunteer Leadership. Heritage's Advisory Council assists program leadership, management, and the Board to further address aspects of the area plan as well as activities, goals, and measures to address service gaps. The Board also regularly reviews agency benchmarks for program activity and financial goals to ensure we are addressing the needs in our region in the most effective and cost efficient manner.

Section 4: Public Input

To obtain public input for the Area Plan, Heritage Area Agency on Aging performed a Community Needs Assessment via survey and held two public hearings – one via Zoom and one in-person.

The Community Needs Assessment was conducted during the summer of 2024 and received 262 responses. Of those responses, 198 (76 percent) were older adults age 60+ and 101 (39 percent) were caregivers. For full details on the Community Needs Assessment, please see the Context Section of the Area Plan.

Public Hearing Information

In accordance with Iowa Administrative Rule, Chapter 6.2(7)(a), Heritage Area Agency on Aging held public hearings related to this Area Plan on Aging. Hearings took place Monday, January 6, 2025, via Zoom and in-person.

The notice was posted to the Heritage AAA website on December 5, 2024. From December 6 – 9, 2024, a copy of the notice was sent to Heritage AAA's County Task Forces, Advisory Council, Board of Directors, Subcontractors, Regional Dining Site Contacts, Iowa Return to Community Referral Network and Elder Abuse Prevention and Awareness Multi-Disciplinary Teams. Between December 7 – 12, 2024, the notice was published in The Cedar Rapids Gazette, Iowa City Press Citizen, Southeast Iowa Union/Washington Journal and Hometown Current.

The following pages include a copy of the notice, proof of publication, copies of meeting agendas, and meeting minutes (including lists of people present) of the hearings.

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:

Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org. Address for the in-person session is the same as the mailing address below. To log in to the Zoom session click here: <https://kirkwood.zoom.us/j/93379546765>

Agenda:

1. Call to order
2. Purpose of hearing
3. Public Comments on Priority Services

Title III-B Priority Services are located within the service categories of Access, In-Home and Legal. The minimum percentage (%) of Title III-B funding required to be expended within each category are: 1) Access Services (10%), which includes information and assistance, assisted transportation, outreach, case management, and transportation, 2) In-Home Services (5%), which includes adult day care/health, personal care, chore, homemaker, and 3) Legal Services (3%), which includes: legal assistance.

1. Written comments
2. Other comments
2. Services under consideration to be provided as Direct Services by Heritage
3. Adjournment

The Area Plan will guide Heritage for the period of State Fiscal Years 2026 – 2029. Comments are also welcomed in the written form of choice or by utilizing a form provided on the Heritage website at www.heritageaaa.org. Written comments should be sent to Heritage Area Agency on Aging, Attention Barb Werning, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to provide feedback and participate in both the virtual or in-person public hearing opportunity and/or provide written comment.

Dining Site Managers throughout region

Kellie Elliott-Kapparos

From: Tim Getty
Sent: Monday, December 9, 2024 4:34 PM
To: 'Traci Wilson'; 'Lisa Tallman, Jones County Senior Dining'; 'ccscinc@windstream.net'; communitycenter@netins.net; 'Katie Oatsvall'; 'Johnson, Nicole'; Jane Drapeaux; 'Marion - Food Service Manager'; 'Immanuel Lutheran Church Kelly Smith'; 'Karlene Hummel'; 'Bonnie Koeppen'; Ryan Waller; 'Ashley Osborn'; 'Kim Guardado'; Angela Albright (AAlbright@hacap.org); 'Scheetz, Sami [LEGIS]'
Cc: Kellie Elliott-Kapparos
Subject: Public Hearing Notice for Upcoming Area Plan
Attachments: Public Notice for 2026-2029 Area Plan Public Hearing and Comments.docx; 2026 - 2029 Area Plan Written Comment Form.doc

Hello,

Please find attached and below, information regarding a public hearing on the multi-year area plan in the Heritage service region.

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:
Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org.

If you have any questions, please feel free to reach out to me.

Thank you,

Tim Getty

Heritage Area Agency on Aging

6301 Kirkwood Boulevard SW | Cedar Rapids, IA 52406
319.398.7682 | 800.332.5934 | Fax: 319.398.5533 | www.heritageaaa.org
Find us on Facebook!

The Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

This email message and its attachments may contain confidential information that is exempt from disclosure under Iowa Code chapters 22, 139A, and other applicable law. Confidential information is for the sole use of the intended recipient. If you believe that you have received this transmission in error, please reply to the sender, and then delete all copies of this message and any attachments. If you are not the intended recipient, you are hereby notified that any review, use, retention, dissemination, distribution or copying of this message is strictly prohibited by law.

Find us on Facebook!

The Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

This email message and its attachments may contain confidential information that is exempt from disclosure under Iowa Code chapters 22, 139A, and other applicable law. Confidential information is for the sole use of the intended recipient. If you believe that you have received this transmission in error, please reply to the sender, and then delete all copies of this message and any attachments. If you are not the intended recipient, you are hereby notified that any review, use, retention, dissemination, distribution or copying of this message is strictly prohibited by law.

Privileged/Confidential Information may be contained in this message. If you are not the addressee indicated in this message (or responsible for delivery of the message to such person), you may not copy or deliver this message to anyone. In such case, you should destroy this message and kindly notify the sender by reply email. Please advise immediately if you or your employer do not consent to Internet email for messages of this kind. Opinions, conclusions and other information in this message that do not relate to the official business of my organization shall be understood as neither given nor endorsed by it.

CONFIDENTIALITY NOTICE: The content of this email message and any attachments are confidential and may be legally privileged, intended solely for the addressee. If you are not the intended recipient, be advised that any use, dissemination, distribution, or copying of this e-mail is strictly prohibited. If you receive this message in error, please notify the sender immediately by reply email and destroy the message and its attachments.

IRTC Referral Network

Kellie Elliott-Kapparos

From: Kimi Hambright
Sent: Monday, December 9, 2024 8:51 AM
To: 'Wasson, Dianne R.'; 'Hutchcroft, Zachary A.'; 'Larson, Caitlin J.'; 'Reitzel, Taylor A.'; 'Jmcdermott@mercyare.org'; 'alcole@mercyare.org'; 'sgrommon@mercyare.org'; 'Gragg, Adriene L.'; 'agibson@mercyare.org'; 'mhines@mercyare.org'; Tara Wagner; 'jwrtjes@mercyare.org'; 'kvoss@mercyare.org'
Cc: Kellie Elliott-Kapparos
Subject: FW: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well
Attachments: 2026 - 2029 Area Plan Written Comment Form.docx; Public Notice for 2026-2029 Area Plan Public Hearing and Comments.docx
Importance: High

From: Kellie Elliott-Kapparos <Kellie.Elliott-Kapparos@kirkwood.edu>
Sent: Wednesday, December 4, 2024 3:29 PM
To: Barb Werning <Barb.Werning@kirkwood.edu>; Jill Sindt <Jill.Sindt@kirkwood.edu>; Jennifer Knudtson <Jennifer.Knudtson@kirkwood.edu>; Jill Sindt <Jill.Sindt@kirkwood.edu>; Harrison March <Harrison.March@kirkwood.edu>; Laura Kriegermeier <Laura.Kriegermeier@kirkwood.edu>; Tim Getty <Tim.Getty@kirkwood.edu>; Kimi Hambright <Kimi.Hambright@kirkwood.edu>
Cc: Kellie Elliott-Kapparos <Kellie.Elliott-Kapparos@kirkwood.edu>
Subject: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well
Importance: High

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:
Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org.

Thank you.

Kellie Elliott-Kapparos
Integrated Services Director

(319)540-1386



6301 Kirkwood Boulevard SW | Cedar Rapids, IA 52404
Main Line: 319.398.5559 | Cell: 319.540.1386 | Fax: 319.398.5533 | www.heritageaaa.org
Find us on Facebook!

Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

This email message and its attachments may contain confidential information that is exempt from disclosure under Iowa Code chapters 22, 139A, and other applicable law. Confidential information is for the sole use of the intended recipient. If you believe that you have received this transmission in error, please reply to the sender, and then delete all copies of this message and any attachments. If you are not the intended recipient, you are hereby notified that any review, use, retention, dissemination, distribution or copying of this message is strictly prohibited by law.

Johnson Co. EAPA MDT

Kellie Elliott-Kapparos

From: Laura Kriegermeier
Sent: Friday, December 6, 2024 11:41 AM
To: 'abbey.ferenzi@unitypoint.org'; Amanda Leemhuis; Amy Howell; Ann Thompson; Ben Symonds; Bigaba, Edmond; Blackhurst, Charles; Brian Platz; Cherie White; Colette Hartley (hartleyc@vnaic.org); Drew Floyd; Eric Nurnberg; 'Erin Sullivan'; Fiona Johnson; Gretchen Schmuck; Jeff Kellbach; Jim Kringlen; Jorey Bailey; Karen Evans; Kate Bengtson; Katrina Rudish; Kelly Weston (kweston@johnsoncountyiowa.gov); Kelly Lamb; Len Sandler; Lori Verdick; 'Melissa Wahl'; Mike Mothers; Railsback, Pam [HHS]; Scott Gaarde; Scott Hawes; Stan Laverman; Steve Nachazel; Uriel Darnell Moorner
Cc: Kellie Elliott-Kapparos
Subject: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:
Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org.

Thank you.

Laura Kriegermeier, BSW (She/her/hers)
Elder Rights Coordinator


Area Agency on Aging

Kirkwood Community College | 6301 Kirkwood Boulevard SW | Cedar Rapids, IA 52404
319.398.5559 or directly at 319-398-7681 | C: 319-361-9136 | 800.332.5934 | Fax: 319.398.5533 |
www.heritageaaa.org | [Find us on Facebook!](#)

The Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

This email message and its attachments may contain confidential information that is exempt from disclosure under Iowa Code chapters 22, 139A, and other applicable law. Confidential information is for the sole use of the intended recipient. If you believe that you have received this transmission in error, please reply to the sender, and then delete all copies of this message and any attachments. If you are not the intended recipient, you are hereby notified that any review, use, retention, dissemination, distribution or copying of this message is strictly prohibited by law.

Linn Co. EAPA MDT

Kellie Elliott-Kapparos

From: Laura Kriegermeier
Sent: Friday, December 6, 2024 11:41 AM
To: Abigail Martin (aemartin@mercyare.org); Amanda Leemhuis; Andy Olesen ; Blackhurst, Charles; DeMoss, Justin G.; Drew Floyd; Elena Wolford; Hansel, Charity B.; Jena Maloney; Jennifer Owens; Karen Evans; Len Sandler; Lisa Gavin; Mary Ann H. Grobstich (mgrobstich@mercyare.org); Railsback, Pam [HHS]; Richard Nesmith; Roehelle Wilcox; Samantha Shannon (sshannon@foundation2.org); Siver, Melody; Suellen Parson; Tara Wagner; Tina Flippo; 'Trpkosh, Jamie'; Uriel Darnell Moorer
Cc: Kellie Elliott-Kapparos
Subject: FW: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well

Importance: High

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:
Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org.

Thank you.

Laura Kriegermeier, BSW (She/her/hers)
Elder Rights Coordinator



Kirkwood Community College | 6301 Kirkwood Boulevard SW | Cedar Rapids, IA 52404
319.398.5559 or directly at 319-398-7681 | C: 319-361-9136 | 800.332.5934 | Fax: 319.398.5533 |
www.heritageaaa.org | **Find us on Facebook!**

The Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

This email message and its attachments may contain confidential information that is exempt from disclosure under Iowa Code chapters 22, 139A, and other applicable law. Confidential information is for the sole use of the intended recipient. If you believe that you have received this transmission in error, please reply to the sender, and then delete all copies of this message and any attachments. If you are not the intended recipient, you are hereby notified that any review, use, retention, dissemination, distribution or copying of this message is strictly prohibited by law.

Heritage Board of Directors

Kellie Elliott-Kapparos

From: Barb Werning
Sent: Friday, December 6, 2024 8:58 AM
To: Jessica Fairbanks; 'Karen Huber'; Dusti Winkie; Dvorak, BJ; 'O'Connor, Susan, Sr.'; Scott Olson; kfisher@washph.com; 'David.Thielen@linncountyiowa.gov'; 'john.schlarmann@jonescountyiowa.gov'; 'V Fixmer-Oraiz'; 'cmontross@iowacounty.iowa.gov'; Bruce Barnhart; 'Sarah Wagner'; Keith Stamp; 'elwaller39@aol.com'
Cc: Kellie Elliott-Kapparos
Subject: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well
Attachments: 2026 - 2029 Area Plan Written Comment Form.docx; Public Notice for 2026-2029 Area Plan Public Hearing and Comments.docx
Importance: High

Good morning

Please read the notice below. A public hearing is a requirement of our Area Plan FY 26-29.

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:
Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org.

Thank you.

Kellie Elliott-Kapparos
Integrated Services Director
(319)540-1386


Area Agency on Aging

6301 Kirkwood Boulevard SW | Cedar Rapids, IA 52404

Main Line: 319.398.5559 | Cell: 319.540.1386 | Fax: 319.398.5533 | www.heritageaaa.org
Find us on Facebook!

Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

This email message and its attachments may contain confidential information that is exempt from disclosure under Iowa Code chapters 22, 139A, and other applicable law. Confidential information is for the sole use of the intended recipient. If you believe that you have received this transmission in error, please reply to the sender, and then delete all copies of this message and any attachments. If you are not the intended recipient, you are hereby notified that any review, use, retention, dissemination, distribution or copying of this message is strictly prohibited by law.

Heritage Task Forces & Advisory Council
(includes some PSA elected officials)

Kellie Elliott-Kapparos

From: Harrison March
Sent: Friday, December 6, 2024 9:08 AM
To: Kellie Elliott-Kapparos
Subject: RE: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well

Correct 😊

Harrison March (he/him/his)
Heritage Area Agency on Aging
319-310-7755

From: Kellie Elliott-Kapparos <Kellie.Elliott-Kapparos@kirkwood.edu>
Sent: Friday, December 6, 2024 8:50 AM
To: Harrison March <Harrison.March@kirkwood.edu>
Subject: RE: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well

Harrison,

Who did this go to? Advisory Council and Task Force?

Thanks,
Kellie

From: Harrison March <Harrison.March@kirkwood.edu>
Sent: Friday, December 6, 2024 8:29 AM
Cc: Kellie Elliott-Kapparos <Kellie.Elliott-Kapparos@kirkwood.edu>
Subject: FW: Upcoming Public Hearings on Heritage AAA's 4 year Area Plan - comments welcome as well
Importance: High

Hi all—

See the message below from Kellie at Heritage AAA regarding an upcoming public hearing. She is CC'ed on this email and her phone number is below if you have any questions. Happy Friday 😊

Harrison March (he/him/his)
Heritage Area Agency on Aging
319-310-7755

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:
Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org.

Thank you.

Kellie Elliott-Kapparos
Integrated Services Director
(319)540-1386

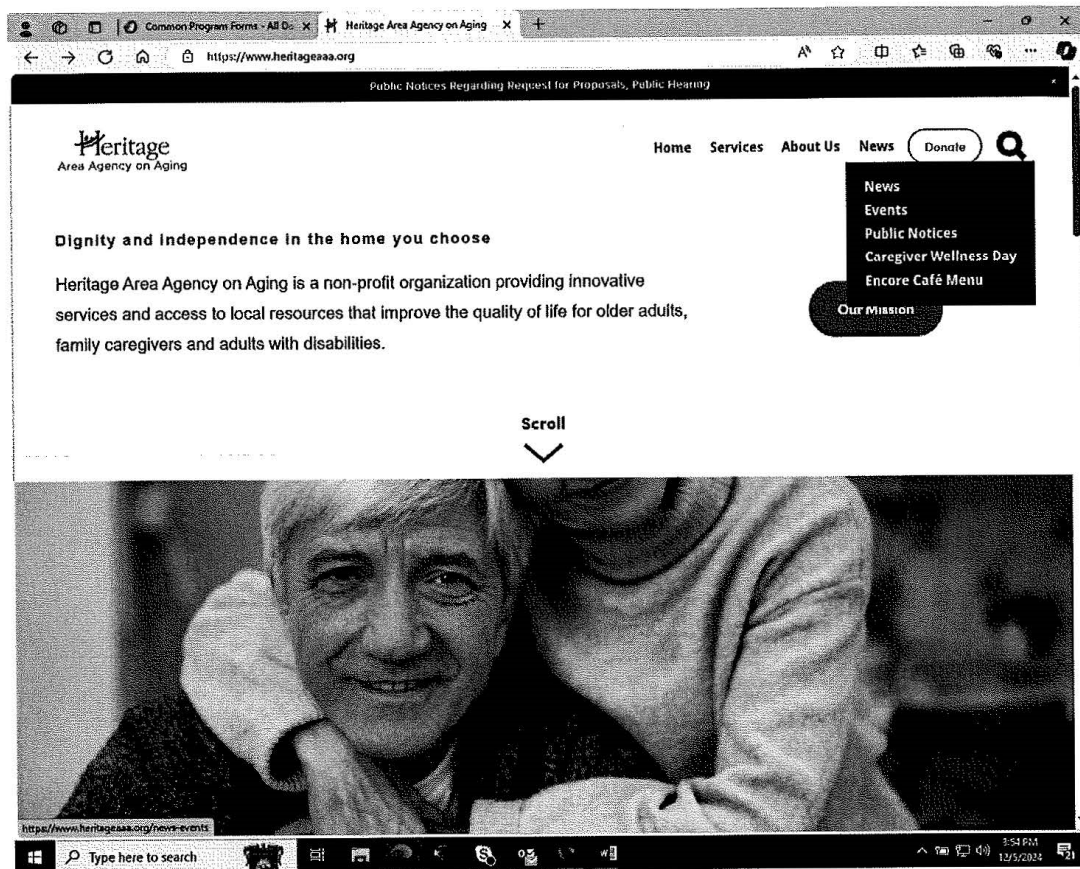


6301 Kirkwood Boulevard SW | Cedar Rapids, IA 52404
Main Line: 319.398.5559 | Cell: 319.540.1386 | Fax: 319.398.5533 | www.heritageaaa.org
Find us on Facebook!

Heritage Area Agency on Aging does not discriminate based on age, color, creed, familial status, gender identity, marital status, mental disability, national origin, physical disability, race, religion, sex, sexual orientation, or political affiliation in its employment practices or the provision of services except where it is a requirement of law.

This email message and its attachments may contain confidential information that is exempt from disclosure under Iowa Code chapters 22, 139A, and other applicable law. Confidential information is for the sole use of the intended recipient. If you believe that you have received this transmission in error, please reply to the sender, and then delete all copies of this message and any attachments. If you are not the intended recipient, you are hereby notified that any review, use, retention, dissemination, distribution or copying of this message is strictly prohibited by law.

Proof of Area Plan Public Hearing Notice posted to heritageaaa.org on 12/5/24.



PUBLIC NOTICE REGARDING REQUEST FOR PROPOSALS

Heritage Area Agency on Aging is seeking applications from any non-profit agency or private organization to provide and/or expand home and community based services to individuals, age 60 and older, in Benton, Cedar, Iowa, Johnson, Jones, Linn and/or Washington counties. Heritage is issuing a request for proposal (RFP) to obtain service provider(s) for home and community based services in the region. This announcement and delay of RFP timeline is out of our traditional sequence due to changes with the Iowa Department of Health and Human Services realignment and Older Americans Act revised regulations.

The agency will award contracts for up to a three year period. Applications are for the period of July 1, 2026 through June 30, 2029, with an annual update. A Letter of Intent to Submit RFP is required and due by Monday, February 26, 2025 by 4pm to kelliot@kirkwood.edu. The RFP

submit such letter. A Zoom meeting will be offered on Wednesday, January 15, 2025 at 9am to explain this process and review timelines. The meeting can be accessed at <https://kirkwood.zoom.us/j/96858788436> or by phone at (301) 715- 8592 or (305) 224-1968 (US Toll), Meeting ID: 968 5878 8436.

Heritage is issuing a request for proposal (RFP) to obtain a service provider(s) that can demonstrate the ability to provide quality services through the utilization of a cost effective and efficiently managed service delivery system. Proposals are being accepted that serve the entire seven county Heritage region or individual communities or counties.

Services delivered through Heritage funding are required to meet all federal and state obligations of the proposed service, including the Older Americans Act of 1965 (revised), funding source(s) and Heritage contractual terms.

In fiscal year 2025, Heritage Area Agency on Aging funded the following services through the RFP process: congregate meals, home delivered meals, adult day health services, assisted and standard

and their definitions open for consideration during the FY 2027 - 2029 RFP process will be released with the RFP documents on January 6, 2026.)

The Letter of Intent to Submit RFP (due 2/26/25) should include the following information:
Agency Name, Location, Contact Name, Contact Email, Contact Phone, and Service(s) and Service Areas intended to RFP.

During the period of February 26, 2025 through February 2026 technical assistance will be offered to all bidders in regards to contractual requirements, state and federal regulations to be eligible for funding and other compliance matters. These dates and times will be provided to those that submit a Letter of Intent. Submitting a Letter of Intent does not require an organization/agency to apply. Assistance in understanding the directions for preparing the application will be offered at these informational meetings and frequently asked questions will be posted on the Heritage website. More information on the process and the opportunity to ask clarifying questions will be described in detail with the release of the RFP packet in January 2026.

2029 contract period will be due in February
2026.

NOTICE OF PUBLIC HEARING ON MULTI-YEAR AREA PLAN FOR BENTON, CEDAR, IOWA, JOHNSON, JONES, LINN AND WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on:

Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org. Address for the in-person session is the same as the mailing address below.

Agenda:

1. Call to order
2. Purpose of hearing
3. Public Comments on Priority Services

Title III-B Priority Services are located within the service categories of Access, In-Home and Legal.

The minimum percentage (%) of Title III-B funding required to be expended within each category are:

- 1) Access Services (10%), which includes Information and Assistance, Assisted Transportation, Outreach, Case Management, and Transportation,
- 2) In-Home Services (5%), which includes Adult Day Care/Health, Personal Care, Chore, Homemaker, and
- 3) Legal Services (3%,) which includes: Legal Assistance.

1. Written comments
2. Other comments

2. Adjournment

The Area Plan will guide Heritage for the period of State Fiscal Years 2026 – 2029. Comments are also welcomed in the written form of choice or by utilizing a form provided on the Heritage website at www.heritageaaa.org. Written comments should be sent to Heritage Area Agency on Aging, Attention Barb Werning, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to provide feedback and participate in both the virtual or in-person public hearing opportunity and/or provide written comment.

[Click Here to Open Written Comment Form](#)

[Click Here to Return to Top](#)

Contact
Heritage AAA

Business
Hours

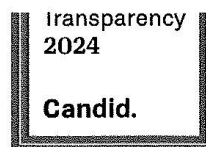
Info



Cedar Rapids,
IA 52404

8:00 am – 4:30
pm

HIPAA Manual
Grievance
Policy
Accessibility
Fiscal
Information



Main Office:
(319) 398-
5559
Toll Free: 1-
800-332-5934



Email:
heritage.agenc
y@kirkwood.e
du

Area Plan

The Gazette

thegazette.com

ATTESTATION OF PUBLIC LEGAL NOTICE

On Behalf of:
Ad No 82590
HERITAGE AREA AGENCY ON AGING
6301 KIRKWOOD BLVD SW
CEDAR RAPIDS, IA 52404
UNITED STATES

STATE OF IOWA COUNTIES OF LINN AND JOHNSON:

Before the undersigned authority personally appeared said legal clerk, who on oath says that he or she is a Legal Advertising Representative of the THE GAZETTE, a daily newspaper published in Linn and Johnson County, Iowa that the digital copy of advertisement, being a Legal Ad in the matter of

Legals - PHN for 2026-2029 Area Plan PH & Comments

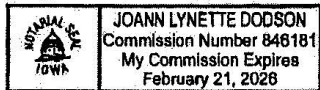
as published in The Gazette in the issue(s) of:

12/7/2024

Affiant further says that the said THE GAZETTE is a newspaper in said Linn and Johnson County, Iowa and that the said newspaper has heretofore been continuously published in said Linn and Johnson County, Iowa each day and has been entered as periodicals matter at the post office in CEDAR RAPIDS in said Linn County, Iowa, for a period of one year next preceding the first publication of the digital copy of advertisement; and affiant further says that he or she has never paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper. Sworn to and Subscribed before me by legal clerk who is personally known to me

Zach Kuchel

Joann Lynette Dodson



Publication Cost: \$51.62
Customer No: 108186

Kellie Elliott-Kapparos

From: Kasie Mesch <kasie.mesch@thegazette.com>
Sent: Monday, December 9, 2024 12:05 PM
To: Kellie Elliott-Kapparos
Subject: Campaign 82590
Attachments: HERITAGE AREA AGENCY ON AGING Ad No 82590 .pdf; 82590.pdf; CRB_12_07SAGZM008.pdf

WARNING: This email originated outside of Kirkwood Community College.
DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.

Good afternoon,
Attached is the affidavit, invoice, and page proof for campaign 82590.
Thank you.

Kasie Mesch
Sales Coordinator
319.398.8455

The Gazette



Invoice No.	IN127909
Campaign No.	82590
Description	Legals - PHN for 2026-2029 Area Plan PH & Comments
Invoice Date	12/7/2024
P.O. Number	
Sales Rep(s)	LEGALS

bill-to

HERITAGE AREA AGENCY ON AGING
ATTN: Accounts Payable
6301 KIRKWOOD BLVD SW
CEDAR RAPIDS, IA 52404
UNITED STATES
Account No: 108186

advertiser

HERITAGE AREA AGENCY ON AGING
HERITAGE AREA AGENCY ON AGING
6301 KIRKWOOD BLVD SW
CEDAR RAPIDS, IA 52404
UNITED STATES
Account No: 108186

please remit payment to

Gazette Communications, Inc.
PO Box 1862
Cedar Rapids, IA 52406-1862
Questions? Call us at 319.368.8800

ACH Payment Information

MidWest One Bank, Iowa City, IA
Account name: Gazette Communications, Inc.
Bank Transit Number: 073901233
Account Number: 4549743
Please email remit to: billing@thegazette.com

payment due

Currency	US Dollar
Gross Amount	51.62
Agency Commission	0.00
Net Amount	51.62
Pre-Paid Amount	0.00
Payment Amount Due	\$ 51.62
Payment Due Date	1/30/2025

Accounts over 60 days will be assessed a finance charge of 1.5% per month (18% APR)

print lines

Product	Start	End	Description	Ad Size(s)	P.O. Number	Qty	Rate	Amount
The Gazette	12/7/2024	12/7/2024	Legal Notice	1 Columns x 80.5 Agate Lines		1	51.62	51.62

invoice no.	invoice date	sales rep(s)
IN127909	12/7/2024	LEGALS
bill-to		advertiser
HERITAGE AREA AGENCY ON AGING ATTN: Accounts Payable 6301 KIRKWOOD BLVD SW CEDAR RAPIDS, IA 52404 UNITED STATES Account No: 108186		HERITAGE AREA AGENCY ON AGING HERITAGE AREA AGENCY ON AGING 6301 KIRKWOOD BLVD SW CEDAR RAPIDS, IA 52404 UNITED STATES Account No: 108186
PAYMENT REMITTANCE		
SEND PAYMENT TO		PLEASE PAY THIS AMOUNT
Gazette Communications, Inc. PO Box 1862 Cedar Rapids, IA 52406-1862		<div style="border: 1px solid black; padding: 5px; text-align: center;"> \$ 51.62 </div>
REMEMBER: DETACH AND RETURN THIS PORTION WITH REMITTANCE FOR PROPER CREDIT		



Area Plan
Iowa City
Press Citizen
PO Box 631851 Cincinnati, OH 45263-1851

AFFIDAVIT OF PUBLICATION

Heritage Area Agency on Aging
6301 Kirkwood BLVD SW
Cedar Rapids IA 52404-5260

STATE OF WISCONSIN, COUNTY OF BROWN

The Iowa City Press Citizen, a newspaper printed and published in the city of Iowa, Johnson County, State of Iowa, and personal knowledge of the facts herein state and that the notice hereto annexed was Published in said newspapers in the issue:

12/10/2024

and that the fees charged are legal.
Sworn to and subscribed before on 12/10/2024

D. Roberts
Legal Clerk
Nicole Jacobs
Notary, State of WI, County of Brown
8-21-26

My commission expires

Publication Cost:	\$62.80	
Tax Amount:	\$0.00	
Payment Cost:	\$62.80	
Order No:	10834941	# of Copies:
Customer No:	1498883	0
PO #:	LIOW0203447	

THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

NICOLE JACOBS
Notary Public
State of Wisconsin

HERITAGE AREA AGENCY ON
AGING ANNOUNCES PUBLIC
HEARING ON AREA PLAN
NOTICE OF PUBLIC HEARING
ON MULTI-YEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on: Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org. Address for the in-person session is the same as the mailing address below.

Agenda:

1. Call to order
2. Purpose of hearing
3. Public Comments on Priority Services

Title III-B Priority Services are located within the service categories of Access, In-Home and Legal. The minimum percentage (%) of Title III-B funding required to be expended within each category are: 1) Access Services (10%), which includes Information and Assistance, Assisted Transportation, Outreach, Case Management, and Transportation, 2) In-Home Services (5%), which includes Adult Day Care/Health, Personal Care, Chore, Homemaker, and 3) Legal Services (3%), which includes: Legal Assistance.

- A. Written comments
- B. Other comments

4. Services under consideration to be provided as Direct Services by Heritage
5. Adjournment

The Area Plan will guide Heritage for the period of State Fiscal Years 2026 – 2029. Comments are also welcomed in the written form of choice or by utilizing a form provided on the Heritage website at www.heritageaaa.org.

Written comments should be sent to Heritage Area Agency on Aging, Attention Barb Werning, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404. The public is invited and encouraged to provide feedback and participate in both the virtual or in-person public hearing opportunity and/or provide written comment.
December 10 2024
LIOW0203447

Kellie Elliott-Kapparos

From: Iowa City Legals <legals@press-citizen.com>
Sent: Wednesday, December 4, 2024 3:59 PM
To: Kellie Elliott-Kapparos
Subject: Thank you for placing your order with us.

WARNING: This email originated outside of Kirkwood Community College.
DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.

THANK YOU for your ad submission!

This is your confirmation that your order has been submitted. Below are the details of your transaction. Please save this confirmation for your records.

We appreciate you using our online self-service ads portal, available 24/7. Please continue to visit Iowa City Press Citizen's online Classifieds [HERE](#) to place your legal notices in the future.

Changes and/or cancellations may not be honored up to 2 business days prior to your first publication date.

Job Details	Schedule for ad number LIOW02034470
Order Number: LIOW0203447	Tue Dec 10, 2024
Classification: Public Notices	Iowa City Press Citizen
Package: General Package	All Zones
Additional Options: 1 Affidavit \$10.00	
Base amount: \$62.80	
Service fee: \$2.51	
Cash/Check/ACH ◆	
Discount: -\$0.00	
Total payment: \$65.31	
As an incentive for customers, we provide a discount off the total order cost equal to the 3.99% service fee if you pay with Cash/Check/ACH. Pay by Cash/Check/ACH and save! In no event are service fees refundable.	
Payment Type: visa	
Account Details	
Kellie Elliott-Kapparos	
Heritage Area Agency on Aging 6301	
Kirkwood Blvd. SW	
Cedar Rapids, IA ◆ 52404	
319-540-1386	

HERITAGE AREA AGENCY ON
AGING ANNOUNCES PUBLIC
HEARING ON AREA PLAN
NOTICE OF PUBLIC HEARING
ON MULTI-YEAR AREA PLAN
FOR BENTON, CEDAR, IOWA,
JOHNSON, JONES, LINN AND
WASHINGTON COUNTIES

To older persons, public officials and other interested parties, pursuant to Iowa Administrative Code Chapter 17 – 6.2(7)a.(2):

The public is notified and invited to attend a public hearing being conducted by Heritage Area Agency on Aging regarding the Fiscal Years 2026 - 2029 Area Plan for the seven county region (Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties).

The purpose of the public hearings are to gather input and comments from interested parties, including priority services. Public hearings will be conducted on: Monday, January 6, 2025 from 1:00 – 2:00 p.m. via Zoom virtual meeting or in-person at the Heritage Main Office from 2:30-3:30 p.m. Login information for the Zoom session will be posted on Heritage Area Agency on Aging's website by December 7, 2024 at: www.heritageaaa.org. Address for the in-person session is the same as the mailing address below.

Agenda:

1. Call to order
2. Purpose of hearing
3. Public Comments on Priority Services

Title III-B Priority Services are located within the service category

Southeast Iowa

Union

Fairfield Ledger
Mt. Pleasant News
Washington Journal

Clarion-Plainsman
The New London Journal
Winfield Beacon-Wayland News

ATTESTATION OF PUBLIC LEGAL NOTICE

On Behalf of:
Ad No 82593
HERITAGE AREA AGENCY ON AGING
6301 Kirkwood Blvd SW
CEDAR RAPIDS, IA 52404
UNITED STATES

STATE OF IOWA COUNTIES OF WASHINGTON, HENRY, JEFFERSON, IOWA, BENTON, POWESHIEK and KEOKUK:
Before the undersigned authority personally appeared said legal clerk, who on oath says that he or she is a Legal Advertising Representative of the
THE UNION, a daily newspaper published in Washington, Henry, Jefferson, Iowa, Benton, Poweshiek and Keokuk County, Iowa that the digital copy
of advertisement, being a Legal Ad in the matter of

Legals - PHN for 2026-2029 Area Plan PH & Comments

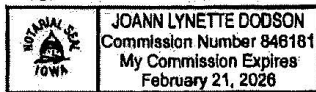
as published in Washington Journal in the issue(s) of:

12/12/2024

Affiant further says that the said THE UNION is a newspaper in said Washington, Henry, Jefferson, Iowa, Benton, Poweshiek and Keokuk County,
Iowa and that the said newspaper has heretofore been continuously published in said Washington, Henry, and Jefferson County, Iowa each day and
has been entered as periodicals matter at the post office in CEDAR RAPIDS in said Washington, Henry, Jefferson, Iowa, Benton, Poweshiek and
Keokuk County, Iowa, for a period of one year next preceding the first publication of the digital copy of advertisement; and affiant further says that
he or she has never paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this
advertisement for publication in the said newspaper. Sworn to and Subscribed before me by legal clerk who is personally known to me

Matthew W Bryant

Joann Lynette Dodson



Publication Cost: \$51.62
Customer No: 130916



Fairfield Ledger
Mt. Pleasant News
Washington Journal

Clarion-Plaineman
The New London Journal
Winfield Beacon-Wayland News

Invoice No. IN128457
Campaign No. 82593
Description Legals - PHN for 2026-2029 Area Plan PH & Comments
Invoice Date 12/12/2024
P.O. Number
Sales Rep(s) LEGALS

bill-to

HERITAGE AREA AGENCY ON AGING
ATTN:
6301 Kirkwood Blvd SW
CEDAR RAPIDS, IA 52404
UNITED STATES
Account No: 130916

advertiser

HERITAGE AREA AGENCY ON AGING
HERITAGE AREA AGENCY ON AGING (Legals)
6301 Kirkwood Blvd SW
CEDAR RAPIDS, IA 52404
UNITED STATES
Account No: 130916

please remit payment to

WMPF Group, LLC.
PO Box 1862
Cedar Rapids, IA 52406-1862
Questions? Call us at [319.368.8800](tel:319.368.8800)

ACH Payment Information

MidWest One Bank, Iowa City, IA
Account name: Gazette Communications, Inc.
Bank Transit Number: 073901233
Account Number: 4549743
Please email remit to: billing@thegazette.com

payment due

Currency	US Dollar
Gross Amount	51.62
Agency Commission	0.00
Net Amount	51.62
Pre-Paid Amount	0.00
Payment Amount Due	\$ 51.62
Payment Due Date	1/30/2025

Accounts over 60 days will be assessed a finance charge of 1.5% per month (18% APR)

print lines

Product	Start	End	Description	Ad Size(s)	P.O. Number	Qty	Rate	Amount
Washington Journal	12/12/2024	12/12/2024	Legal Notice	1 Columns x 80.5 Agate Lines		1	51.62	51.62

invoice no.	invoice date	sales rep(s)
IN128457	12/12/2024	LEGALS
bill-to		advertiser
HERITAGE AREA AGENCY ON AGING ATTN: 6301 Kirkwood Blvd SW CEDAR RAPIDS, IA 52404 UNITED STATES Account No: 130916		HERITAGE AREA AGENCY ON AGING HERITAGE AREA AGENCY ON AGING (Legals) 6301 Kirkwood Blvd SW CEDAR RAPIDS, IA 52404 UNITED STATES Account No: 130916
PAYMENT REMITTANCE		
SEND PAYMENT TO WMPF Group, LLC. PO Box 1862 Cedar Rapids, IA 52406-1862		PLEASE PAY THIS AMOUNT <div style="border: 1px solid black; padding: 2px; display: inline-block;"> \$ 51.62 </div> REMEMBER: DETACH AND RETURN THIS PORTION WITH REMITTANCE FOR PROPER CREDIT

Kellie Elliott-Kapparos

From: Krystal Estrada <Krystal.Estrada@southeastiowaunion.com>
Sent: Friday, December 13, 2024 2:30 PM
To: Kellie Elliott-Kapparos
Subject: Legal Affidavit, Invoice, and E-Tear - Campaign 82593
Attachments: HERITAGE AREA AGENCY ON AGING_Washington Journal_Ad No 82593.pdf; IN128457 - 82593.pdf; CRW_12_12THUWM009.pdf

WARNING: This email originated outside of Kirkwood Community College.
DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.

Attached is the affidavit, invoice, and e-Tear for your most recent legal notice. For questions regarding your legal notices or to publish future notices please email GTLegals@thegazette.com.

Thank you and have a great day!

Krystal Estrada

ADVERTISING SPECIALIST | EMPLOYEE OWNER

SOUTHEAST IOWA UNION | CLARION – PLAINSMAN
WILLIAMSBURG JOURNAL TRIBUNE | MARENGO PIONEER REPUBLICAN
BELLE PLAINE STAR PRESS UNION | POWESHIEK COUNTY CHRONICLE REPUBLICAN
WINFIELD BEACON – WAYLAND NEWS | NEW LONDON JOURNAL

Central Iowa

Union

Marion Pioneer Republican
Poweshiek Co. Chronicle Republican
Williamsburg Journal Tribune

Hometown Current
Hometown Marketplace

ATTESTATION OF PUBLIC LEGAL NOTICE

On Behalf of:
Ad No 82592
HERITAGE AREA AGENCY ON AGING
6301 Kirkwood Blvd SW
CEDAR RAPIDS, IA 52404
UNITED STATES

STATE OF IOWA COUNTIES OF IOWA, BENTON, POWESHIEK and KEOKUK:

Before the undersigned authority personally appeared said legal clerk, who on oath says that he or she is a Legal Advertising Representative of the Hometown Current, a weekly newspaper published in Iowa, Benton, Poweshiek and Keokuk County, Iowa that the digital copy of advertisement, being a Legal Ad in the matter of

Legals - PHN for 2026-2029 Area Plan PH & Comments

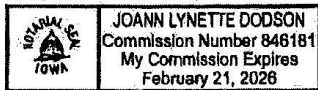
as published in Hometown Current in the issue(s) of:

12/11/2024

Affiant further says that the said Hometown Current is a newspaper in said Iowa, Benton, Poweshiek and Keokuk County, Iowa and that the said newspaper has heretofore been continuously published in said Iowa, Benton, Poweshiek and Keokuk County, Iowa each week and has been entered as periodicals matter at the post office in CEDAR RAPIDS in said Iowa, Benton, Poweshiek and Keokuk County, Iowa, for a period of one year next preceding the first publication of the digital copy of advertisement; and affiant further says that he or she has never paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper. Sworn to and Subscribed before me by legal clerk who is personally known to me

Matthew W Bryant

Joann Lynette Dodson



Publication Cost: \$51.62
Customer No: 130916

Central Iowa

Union

Marshall Pioneer Republican
 Potosi Republican
 Williamsburg Journal Tribune

Hometown Current

Hometown Marketplace

Invoice No. IN128259
 Campaign No. 82592
 Description Legals - PHN for 2026-2029 Area Plan PH & Comments
 Invoice Date 12/11/2024
 P.O. Number
 Sales Rep(s) LEGALS

bill-to

HERITAGE AREA AGENCY ON AGING
 ATTN:
 6301 Kirkwood Blvd SW
 CEDAR RAPIDS, IA 52404
 UNITED STATES
 Account No: 130916

advertiser

HERITAGE AREA AGENCY ON AGING
 HERITAGE AREA AGENCY ON AGING (Legals)
 6301 Kirkwood Blvd SW
 CEDAR RAPIDS, IA 52404
 UNITED STATES
 Account No: 130916

please remit payment to

WMPF Group, LLC.
 PO Box 1862
 Cedar Rapids, IA 52406-1862
 Questions? Call us at 319.368.8800

ACH Payment Information

MidWest One Bank, Iowa City, IA
 Account name: Gazette Communications, Inc.
 Bank Transit Number: 073901233
 Account Number: 4549743
 Please email remit to: billing@thegazette.com

payment due

Currency	US Dollar
Gross Amount	51.62
Agency Commission	0.00
Net Amount	51.62
Pre-Paid Amount	0.00
Payment Amount Due	\$ 51.62
Payment Due Date	1/30/2025

Accounts over 60 days will be assessed a finance charge of 1.5% per month (18% APR)

print lines

Product	Start	End	Description	Ad Size(s)	P.O. Number	Qty	Rate	Amount
Hometown Current	12/11/2024	12/11/2024	Legal Notice	1 Columns x 80.5 Agate Lines		1	51.62	51.62

invoice no.	invoice date	sales rep(s)
IN128259	12/11/2024	LEGALS
bill-to		advertiser
HERITAGE AREA AGENCY ON AGING ATTN: 6301 Kirkwood Blvd SW CEDAR RAPIDS, IA 52404 UNITED STATES Account No: 130916		HERITAGE AREA AGENCY ON AGING HERITAGE AREA AGENCY ON AGING (Legals) 6301 Kirkwood Blvd SW CEDAR RAPIDS, IA 52404 UNITED STATES Account No: 130916
PAYMENT REMITTANCE		
SEND PAYMENT TO		PLEASE PAY THIS AMOUNT
WMPF Group, LLC. PO Box 1862 Cedar Rapids, IA 52406-1862		\$ 51.62
REMEMBER: DETACH AND RETURN THIS PORTION WITH REMITTANCE FOR PROPER CREDIT		

Kellie Elliott-Kapparos

From: Krystal Estrada <Krystal.Estrada@southeastiowaunion.com>
Sent: Wednesday, December 11, 2024 4:54 PM
To: Kellie Elliott-Kapparos
Subject: Legal Affidavit, Invoice, and E-Tear - Campaign 82592
Attachments: HERITAGE AREA AGENCY ON AGING Ad No 82592-Hometown Current.pdf; IN128259 - 82592.pdf; 82592.jpg; CRE_12_11WEHCM006.pdf

WARNING: This email originated outside of Kirkwood Community College.
DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.

Attached is the affidavit, invoice, and e-Tear for your most recent legal notice. For questions regarding your legal notices or to publish future notices please email GTLegals@thegazette.com.

Thank you and have a great day!

Krystal Estrada

ADVERTISING SPECIALIST | EMPLOYEE OWNER

SOUTHEAST IOWA UNION | CLARION – PLAINSMAN
WILLIAMSBURG JOURNAL TRIBUNE | MARENGO PIONEER REPUBLICAN
BELLE PLAINE STAR PRESS UNION | POWESHIEK COUNTY CHRONICLE REPUBLICAN
WINFIELD BEACON – WAYLAND NEWS | NEW LONDON JOURNAL

Public Hearing Information



**Public Hearing
Area Plan Fiscal Year 2026-2029
Monday, January 6, 2025 from 2:30-3:30 p.m.**

**Heritage Area Agency on Aging, Main Office, Conference Room
Kirkwood Community College
6301 Kirkwood Blvd. SW
Cedar Rapids, Iowa 52404**

Agenda:

1. Call to order
2. Purpose of hearing
3. Public Comments on Priority Services
Title IIIB Priority services are located within the service categories of Access, In-Home and Legal. The minimum percentage (%) of Title IIIB funding required to be expended within each category are: 1. Access (10%), which includes assisted transportation, case management, information and assistance, outreach, and transportation. 2. In-Home (5%), which includes adult day care/adult day health, chore, homemaker, and personal care. 3. Legal (3%,) which includes legal assistance.
 - a. Written comments
 - b. Other comments
4. Services under consideration to be provided as Direct Services by Heritage
5. Adjournment



Public Hearing
Area Plan Fiscal Year 2026-2029
Monday, January 6, 2025 from 1:00 – 2:00 p.m.

Via Zoom Virtual Meeting
<https://kirkwood.zoom.us/j/93379546765>

Or join by phone:
(646) 931-3860 or (301) 715-8592 (US Toll)
Meeting ID: 933 7954 6765

Agenda:

1. Call to order
2. Purpose of hearing
3. Public Comments on Priority Services
Title IIIB Priority services are located within the service categories of Access, In-Home and Legal. The minimum percentage (%) of Title IIIB funding required to be expended within each category are: 1. Access (10%), which includes assisted transportation, case management, information and assistance, outreach, and transportation. 2. In-Home (5%), which includes adult day care/adult day health, chore, homemaker, and personal care. 3. Legal (3%,) which includes legal assistance.
 - a. Written comments
 - b. Other comments
4. Services under consideration to be provided as Direct Services by Heritage
5. Adjournment

Heritage AAA Area Plan FY26 – 29 Public Hearings

January 6, 2025

Zoom Hearing at 1:00 p.m.

Present: Joni Thompson, Elizabeth Norris, Leanna Husmann, Jeff Kellbach, Angela McConville

Staff: Kellie Elliott-Kapparos, Barb Werning, Jenn Knudtson, Jill Sindt, Harrison March

Call to Order

Kellie Elliott-Kapparos called the hearing to order at 1:00 p.m. Barb Werning welcomed attendees and thanked them for their time.

Purpose of Hearing

Kellie reviewed the agenda and purpose of the hearing. This is an opportunity for any interested stakeholders and members of the general public to provide comments on Heritage Area Agency on Aging's next Area Plan for Fiscal Years 2026 – 2029.

Public Comments on Priority Services

Kellie reviewed Title IIIB Priority Services and their funding requirements as prescribed by the state unit on aging (Iowa Dept. of Health and Human Services, Aging and Disability Services Division).

Written Comments: Barb provided summary of written comments provided by those unable to attend either of today's hearings. See Appendix A for transcribed comments.

Other Comments: No comments provided by attendees at this time.

Services Under Consideration to be Provided as Direct Services by Heritage

Kellie recited lists of planned Direct Services, intended Funded Services and the Mandatory Services Heritage AAA must provide. There may be overlap in Direct and Funded Services, such as congregate dining programs. There are no changes in categorization from the current Area Plan at Heritage. See Appendix B for list of services by category.

Kellie noted that Heritage AAA staff will remain on the Zoom call through the end of the hearing at 2 p.m. in case anyone decides to provide a comment or other attendees join the meeting late. All are welcome to stay, but no further presentation is planned. Written comments will be accepted until the final Area Plan draft is submitted to the state in April, but submission by January 15, 2025, is encouraged for maximum consideration as the plan is drafted and revised.

All present attendees left the Zoom meeting at approximately 1:15 p.m.

Adjournment

Barb adjourned the meeting at 2:00 p.m.

In-Person Hearing at 2:30 p.m.

Present: Kelly Ondler, Katie Oatsvall, Laura Ondler

Staff: Kellie Elliott-Kapparos, Barb Werning, Jenn Knudtson, Harrison March

Call to Order

Kellie Elliott-Kapparos called the hearing to order at 2:30 p.m. Barb Werning welcomed attendees and thanked them for their time.

Purpose of Hearing

Kellie reviewed the agenda and purpose of the hearing. This is an opportunity for any interested stakeholders and members of the general public to provide comments on Heritage Area Agency on Aging's next Area Plan for Fiscal Years 2026 – 2029.

Public Comments on Priority Services

Kellie reviewed Title IIIB Priority Services and their funding requirements as prescribed by the state unit on aging (Iowa Dept. of Health and Human Services, Aging and Disability Services Division).

Written Comments: Barb provided summary of written comments provided by those unable to attend either of today's hearings. See Appendix A for transcribed comments.

Other Comments:

- Kathy Ondler: home delivered meals are a priority for Horizons clients and by extension for the organization, so she is encouraged to see it on the list of planned services for the coming years. Horizons is looking at expanding services in ways that consider social determinants of health and social isolation.
 - o Katie Oatsvall added that the meal is a great equalizer that everyone needs and relates to, and opening the door for home delivered meals opens the door to other conversations about clients' health and needs.
- Katie asked if the Draft plan can be reviewed and what the timeline is for completion. Kellie provided a snapshot of the timeline, which includes a final submission in early April, and of the process for selecting the agency's goals and objectives within parameters set by Iowa HHS. The process has changed some for this Plan since it is the first full Area Plan to be written under the new HHS structure. Final versions will be available on the Heritage AAA website and likely on the HHS website too.
 - o Barb added that Heritage's Advisory Council and Board of Directors will also review and approve the final version before its submission to the state.
- Katie: as a voice for Horizons' clients, she wants to emphasize the importance of affordable housing, transportation and access to nutrition. Nutrition must be tailored to clients when possible to consider ADLs, health conditions, food deserts and more.

Opportunities to socialize are important as well, and therefore transportation will be key to the success of a future senior center as mentioned by one of the written comments.

- Kathy and Laura: both reported hearing lots of need for transportation, Kathy more so related to medical appointments and Laura encountering need for everyday life like haircuts, groceries and other shopping.
 - o Laura said too many clients slip through the cracks on referrals because they aren't comfortable contacting someone unknown or simply forget to follow through. A Case Manager or county navigator may be able to better serve these clients whose lack of follow through interrupts service delivery.

Services Under Consideration to be Provided as Direct Services by Heritage

Kellie recited lists of planned Direct Services, intended Funded Services and the Mandatory Services Heritage AAA must provide. There may be overlap in Direct and Funded Services, such as congregate dining programs. There are no changes in categorization from the current Area Plan at Heritage. See Appendix B for list of services by category.

Kellie noted that Heritage AAA staff will remain at the meeting through the end of the hearing at 2 p.m. in case anyone decides to provide a comment or other attendees join the meeting late. All are welcome to stay, but no further presentation is planned. Written comments will be accepted until the final Area Plan draft is submitted to the state in April, but submission by January 15, 2025, is encouraged for maximum consideration as the plan is drafted and revised.

Katie thanked Heritage for the opportunity to speak on behalf of Horizons' clients and the chance to work together on the shared goal of serving older Iowans.

All present attendees left the meeting at approximately 3:05 p.m.

Adjournment

Barb adjourned the meeting at 3:30 p.m.

Appendix A: Summary of Written Comments Provided Prior to Public Hearings

1. Fundraising for food. The center in our community services meals for the entire county. Funding for transportation and especially medical trips. The local church pantry is used by residents on a weekly basis. Getting the word out to older adults who don't think they need help or are afraid to ask.
2. Upkeep with nutrition needs. Transportation limits for older adults. Safety in the home. Preventing isolation. Staying active and in good physical shape.
3. Senior center in the Cedar Rapids area which empowers the attendees to be leaders in the programming. While Heritage is not funded to run a senior center, the agency could be a collaborator in its success.
4. Good communication of services and knowledgeable advocates.

Appendix B: Intended Service Categorizations

Services under consideration to be provided as Direct Services by Heritage Area Agency on Aging for the Fiscal Year 2026-2029 Area Plan

Case Management
Congregate Meals
EAPA Consultation
EAPA Assessment & Intervention
EAPA Training & Education
Emergency Response System
Health Promotion: Evidence Based
Health Promotion: Non Evidence-Based
Home Delivered Meals
Homemaker
Information & Assistance
Material Aid
Nutrition Counseling
Nutrition Education
Options Counseling
Outreach
Personal Care
Training & Education
Caregiver Case Management
Caregiver Counseling
Caregiver Information & Assistance
Caregiver Information Services
Caregiver Options Counseling
Caregiver Respite Care
Caregiver Supplemental Services

Written comments will be accepted until the Area Plan is submitted, however, please submit by 1/15/25 for most opportunity to be considered.

We are tentatively planning to open for RFP the following programs in FY2027

- Adult Day Health
- Assisted Transportation

- Caregiver Respite Care (In-Home and Facility Based)
- Chore
- Congregate Meals
- Home Delivered Meals
- Legal Services
- Transportation

Mandatory Services are

- Case Management
- Congregate Meals
- EAPA Assessment & Intervention
- EAPA Consultation
- EAPA Training & Education
- Health Promotion: Evidence-Based
- Home Delivered Meals
- Information & Assistance
- Legal Assistance
- Nutrition Counseling
- Nutrition Education
- Options Counseling
- Caregiver Case Management
- Caregiver Counseling
- Caregiver Information & Assistance
- Caregiver Options Counseling

Governing Body

Heritage Board of Directors for: **Heritage Area Agency on Aging.**

Updated On: **4/3/2025**

Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires
<u>Kirkwood Board of Trustees:</u> Keith Stamp	17787 222 nd Street	Monticello, IA 52310	Jones	319 465-5543 Kstamp50@yahoo.com	August 2027

Vice Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires
<u>Member At-Large:</u> Sister Susan O'Connor	292 Northpointe Drive NE, #302	Cedar Rapids, IA 52402	Linn	319 533-7366 soconnor@mercyare.org	August 2025

Secretary/Secretary-Treasurer

Name	Address	City & Zip	County	Phone & Email	Term Expires
<u>Member At-Large:</u> Karen Huber	3080 Kinsdale Drive	Marion, IA 52302	Linn	319 247-0400 Karen.huber@homeinstead.com	August 2026

Treasurer, (if separate officer)

Name	Address	City & Zip	County	Phone & Email	Term Expires
<u>Member At-Large:</u> Scott Olson	6467 Quail Ridge Drive SW	Cedar Rapids, IA 52404	Linn	319 360-5295 scott@scotteolson.com	August 2027

Other Members

Name	Address	City & Zip	County	Phone & Email	Term Expires
<u>Benton County Board of Supervisors:</u> Sarah Wagner	PO Box 3	Vinton, IA 52349	Benton	319 361-6668 swagner@bentoncountya.gov	August 2025

<u>Cedar County Board of Supervisors:</u> Bruce Barnhart	184 290 th Street PO Box 36	West Branch, IA 52358	Cedar	319 631-1101 bbcus@lcom.net	August 2025
<u>Iowa County Board of Supervisors:</u> Chris Montross	1847 275 th Street	Williamsburg, IA 52361	Iowa	319 430-5243 cmontross@iowacounty.iowa.gov	August 2025
<u>Johnson County Board of Supervisors:</u> Mandi Remington	855 S. Dubuque Street, Room 212A	Iowa City, IA 52240	Johnson	319 688-8001 mremington@johnsoncountyiowa.gov	August 2025
<u>Linn County Board of Supervisors:</u> David Thielen	2018 Hughes Drive SW	Cedar Rapids, IA 52404	Linn	319 551-2241 David.thielen@linncountyiowa.gov	August 2025
<u>Washington County Board of Supervisors:</u> Karri Fisher	110 Iowa Avenue, Suite 300	Washington, IA 52353	Washington	319 653-7758 kfisher@washph.com	August 2025
<u>Jones County Board of Supervisors:</u> Jon Zirkelbach	12005 Edinburgh Road	Center Junction, IA 52212	Jones	319 480-9550 jzirkelbach2014@gmail.com or supv3@jonescountyiowa.gov	August 2025
<u>Member At-Large:</u> BJ Dvorak	311 Goldfinch Drive	Tiffin, IA 52340	Johnson	319 892-6501 Bj.dvorak@linncountyiowa.gov	August 2025
<u>Member At-Large:</u> Dusti Winkie	1614 8 th Avenue	Belle Plaine, IA 52208	Benton	319 444-7036 winkiedk@gmail.com	August 2026

<u>Member At-Large:</u> Jessica Fairbanks	1501 11 th Avenue,	Vinton, IA 52349	Benton	319 721-7454 Jessica.Fairbanks@guardianpharmacy.net	August 2025
<u>Member At-Large:</u> Peggy J. Doerge	34 N 7 th Avenue	Iowa City, IA 52245	Johnson	319 621-8949 Pjd19@aol.com	August 2025
<u>Advisory Council:</u> Evans Waller	1726 Taylor Avenue	Bennett, IA 52721	Cedar	563 249-3410 Elwaller39@aol.com	August 2025
<u>Non-Voting, Advisory Member:</u> Larry Kudej	2770 Jeremy Court NW	Swisher, IA 52338	Johnson	319 857-5191 ldkudej@aol.com	None

Advisory Council

Older Americans Act Section 306(a)(6)(D). Each area agency on aging shall establish an advisory council consisting of older individuals (including minority individuals and older individuals residing in rural areas) who are participants or who are eligible to participate in programs assisted under this Act, family caregivers of such individuals, representatives of the business community, local elected officials, providers of veterans' health care (if appropriate), and the general public, to advise continuously the area agency on aging on all matters relating to the development of the area plan, the administration of the plan and operations conducted under the plan.

Older Americans Act Code of Regulations, Subpart C, Sec. 1321.63 (b) Composition of Council. The council shall include individuals and representatives of community organizations from or serving the planning and service area who will help to enhance the leadership role of the area agency in developing community-based systems of services targeting those in greatest economic need and greatest social need. The advisory council shall be made up of:

- (1) More than 50 percent older individuals, including minority individuals who are participants or who are eligible to participate in programs under this part, with efforts to include individuals identified as in greatest economic need and individuals identified as in greatest social need in [§ 1321.65\(b\)\(2\)](#);
- (2) Representatives of older individuals;

- (3) Family caregivers, which may include older relative caregivers;
- (4) Representatives of health care provider organizations, including providers of veterans' health care (if appropriate);
- (5) Representatives of service providers, which may include legal assistance, nutrition, evidence-based disease prevention and health promotion, caregiver, long-term care ombudsman, and other service providers;
- (6) Persons with leadership experience in the private and voluntary sectors;
- (7) Local elected officials;
- (8) The general public; and
- (9) As available:
 - (i) Representatives from Indian Tribes, Pueblos, or Tribal aging programs; and
 - (ii) Older relative caregivers, including kin and grandparent caregivers of children or adults ages 18 to 59 with a disability.

If the agency's Advisory Council does not currently meet at least 1-8 composition criteria listed above, provide the following information:

1) Composition criteria yet to be satisfied by the Council

None, all composition criteria are satisfied.

Advisory Council for: Heritage Area Agency on Aging
Updated on: 2/4/2025

Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Evans Waller	1726 Taylor Ave	Bennett, IA 52721	Cedar	563-249-3410 Elwaller39@aol.com	June 30, 2025	1, 2, 3, 4, 5, 6, 8

Vice Chair

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Kay Fisk	414 4 th Ave SW	Mount Vernon, IA 52314	Linn	319-361-8956 ekayfisk@outlook.com	June 30, 2025	1, 2, 6

Secretary/Secretary Treasurer

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

Treasurer (if separate officer)

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

Other Members:

Name	Address	City & Zip	County	Phone & Email	Term Expires	OAA Composition Criteria (1 to 7)
Shirley Geadelmann	PO Box 266	Clarence, IA 52216	Cedar	563-452-4183	June 30, 2025	1, 4, 5, 6, 8

Marianne Hanshaw	918 E Washington St	Washington, IA 52353	Washington	Marianne.k.hanshaw@gmail.com	June 30, 2025	1, 2, 5, 8
Judi Hertle	106 Pheasant Ave	Atkins, IA 52206	Benton	tlhjk@southslope.net	June 30, 2025	1, 2, 6, 8
Don Kline	909 S 12 th Ave	Washington, IA 52353	Washington	No1fishdk@Outlook.com	June 30, 2025	1, 6, 8
Larry Kudej	2770 Jeremy Court NW	Swisher, IA 52338	Johnson	ldkudej@aol.com	June 30, 2025	1, 2, 6, 8
Art Staed	2141 Coldstream Ave NE	Cedar Rapids, IA 52402	Linn	Art.staed@Legia.iowa.gov	June 30, 2025	1, 2, 6, 7, 8
Lisa Tallman	112 N Ford St	Anamosa, IA 52205	Jones	lisat@jonescountyiowa.gov	June 30, 2025	1, 2, 3, 5

ATTACHMENTS

Below attachments sent within email message to Eugenia Kendall 4-11-26

Signed Verification of Agency Intent and Compliance

Direct Service Waiver Request Form

Authorized Signatures

Area Agency on Aging Name	Primary Street Address	City & Zip Code	Type of Agency	Date of AAA Designation
Heritage Area Agency on Aging	6301 Kirkwood Blvd SW	Cedar Rapids 52404	Designated AAA Non-Profit 501 C 3	1971

Please **list names and titles** (*signatures are not required*) of all persons authorized to sign and submit documents on behalf of your agency regarding the following areas:

Authorized Signatories for Funding Applications and Contracts

1. Barb Werning, Executive Director
2. Keith Stamp, Board Chair
3. Sister Susan O'Connor, Board Vice Chair
4. Evans Waller, Advisory Council Chair
5. Kellie Elliott-Kapparos, Integrated Services Director
6. Jill Sindt, Community Advancement Director
7. Jennifer Knudtson, Fiscal Director

Authorized Signatories for Fiscal Reports

1. Barb Werning, Executive Director
2. Jennifer Knudtson, Fiscal Director
3. Scott Olson, Board Treasurer

Authorized Signatories for Program Reports

1. Barb Werning, Executive Director
2. Kellie Elliott-Kapparos, Integrated Services Director
3. Jill Sindt, Community Advancement Director
4. Tim Getty, Regional Nutrition Coordinator

5. Laura Kreigermeier, Elder Rights Coordinator

Note: Should any of your agency's authorized signatories change, please submit an updated list to Eugenia Kendall at eugenia.kendall@hhs.iowa.gov within fifteen (15) business days.

Grievance Procedures

Heritage has a formal policy available upon request to anyone in the community. This policy is posted in the entry of each of our buildings, posted on Heritage's website and given to consumers as a part of their initial service enrollment packet. Updates will be required shortly to reflect new code citations.

Staff are trained the following:

- Heritage will treat all consumers with dignity, respect and concern regardless of the means in which they come in contact with Heritage staff (ex. Phone, Office Visit or Home Visit). As an Area Agency on Aging/Aging and Disability Resource Center, all reasonable and allowable efforts will be made to provide consumers with assistance, respond to needs in a timely manner, and provide service in a streamlined "no wrong door" mode of operation. Heritage is dedicated to the safety and well-being of staff and consumers.
- It is regrettable, but there are circumstances when communication with a consumer can deteriorate to the point where staff perceive they cannot get through to the individual or a consumer can begin shouting or become verbally abusive. In these situations, intervention as soon as reasonably possible by a member of the management team or their designee is warranted.

Additionally, Heritage provides a number of services that fall under HIPAA rules. HIPAA covered program consumers receive the Heritage Right to Privacy Practices which outlines their rights and how to request their rights, copies of the medical information and how to file a complaint among other things.

Below is a copy of the Heritage Resolving Complaints and Grievances Policy:

POLICY & PROCEDURES

Subject: Resolving Complaints/Grievances

Date of Adoption: undated

Date of Revision: 05-14-2021

Date of Review: 05-14-2021

Policy:

Heritage Area Agency on Aging will resolve complaints of employees, program participants served under the multiyear area plan, applicants to provide services, service providers, subcontractors or any other agency, organization or individual directly aggrieved by action of Heritage. Heritage procedures shall comply with relevant statutes, regulations, or rules and shall contain at least the procedures included in IAC [17]6.10(5).

Procedures:

1. Complaints involving employment discrimination, sexual harassment or employee complaints will use the procedures please refer to section 1.6 Complaint and Compliance Procedures within the Heritage Employee Handbook.
2. All subcontractors of Heritage will be required to comply with the complaint resolution requirements by provision in its contract with Heritage. Aggrieved parties served by a subcontractor will be referred to that subcontractor and its grievance procedure.
3. Other parties aggrieved by action of Heritage may include program participants or applicants to services provided directly by agency staff, applicants to provide services, service providers, subcontractors or any other agency, organization or individual directly aggrieved by action of Heritage.
4. The following procedure will apply to other parties aggrieved by action of Heritage who do not apply above:
 - a. The complainant shall report in writing to Heritage an alleged violation of law or perceived unfair treatment within fifteen (15) days of its occurrence.
 - b. Heritage will provide for resolution of the complaint within thirty (30) business days of the official filing.
 - c. Heritage will acknowledge the complaint in writing within three (3) business days of the official filing.

- d. A member of the Management Team or other designee of the Director who is familiar with the program/project/activity in which the grievance occurred, if not named directly or indirectly in the complaint, will contact the complainant within 3 (three) business days of the official filing to arrange a meeting within seven (7) business days following the official filing to listen and attempt to resolve the matter informally. If the grievance is resolved, Heritage will ask the complainant to sign confirmation that he/she agrees the matter is resolved.
 - e. If the matter is not resolved, the complainant may request a hearing by the Director to be held within ten (10) business days following the informal meeting. Notice of the hearing will be sent to the complainant by return receipt mail within three (3) business days after the request for hearing.
 - f. The Director will hold the hearing. The complainant may bring witnesses and the Director will hear the story and have opportunity to ask questions. The Director will consider the complaint in accordance with prevailing laws and regulations and reach a decision. The Director will send written notification of the outcome of the hearing to the complainant by return receipt mail within five (5) business days of the hearing.
 - g. The complainant may elect to appeal the decision of the Division Director to Iowa HHS: Aging and Disability Services pursuant to the division's rules and regulations.
5. Heritage Director or designee will forward notification to Iowa HHS: Aging and Disability Services Division within fifteen (15) days of the original filing when allegations of discrimination occur.

Staffing and Volunteer Information

The following table lists the anticipated number of full and part-time positions at the agency, the number of SCSEP beneficiaries employed at the agency, and the number of volunteers supporting the agency at the start of the SFY 2026 (7/1/2025).

Position	Total Number
Staff (paid) full-time:	23
Staff (paid) part-time:	0
SCSEP Beneficiaries:	0
AAA Volunteers:	170

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

Nutrition Services

Agency staff reviewed the following Nutrition Services information in the case management system (Wellsky) and verified that the information is current as of **4/4/2025**

Nutrition Services information to be verified for accuracy includes:

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

Service Providers of OAA Services

Agency staff reviewed the Service Provider information in the case management system (Wellsky) and verified that the information listed below is current as of **4/4/2025**

- Total Providers for all Title III services (parts B/C/D/E)
- Total Providers for Title III services parts B/C/D only
- Total Providers for Title III services part E only
- Total Providers for Home Delivered Nutrition
- Total Providers for Congregate Nutrition
- Total Providers for Home Delivered Nutrition AND Congregate Nutrition
- Total Providers for Information and Assistance

Note: Service provider information in Wellsky should remain current throughout the year.

Senior Centers and Focal Points

Agency staff reviewed the Senior Center and Focal Point information in the case management system (Wellsky) and verified that the information is current as of **3/20/2025**

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

OR

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

Selecting Senior Centers and Focal Points

POLICY & PROCEDURES

Subject: Focal Point Designation

Date of Adoption: undated

Date of Revision: 11/15/2017

Date of Review: 3/19/25

Policy:

The Heritage Area Agency on Aging shall develop and designate, where feasible, a focal point for comprehensive service delivery in each community, giving special consideration to designating multipurpose senior centers, funded partner providers and congregate nutrition sites as community focal points on aging as required in Iowa Code Chapter 231.33(10).

Procedures:

1. Heritage will specify in the area profile the communities and facilities which are designated as focal points on aging. The AAA shall give special consideration to multipurpose senior centers and ensure that the facility currently or potentially can accommodate the collocation of services. In the designation of focal points on aging, the AAA shall consider:
 - a. Communities with the greatest incidence of older adults with the greatest economic and/or social need with particular attention to low-income older individuals including low-income minority older individuals, older individuals with limited English proficiency, and older adults residing in rural areas;
 - b. Efforts of voluntary organizations in the community;
 - c. Needs of participants and the delivery pattern of services funded under this part and funded from other sources;
 - d. Location of multipurpose senior centers and congregate nutrition sites;
 - e. Geographic boundaries of communities and natural neighborhoods; and

- f. Location of facilities suitable for designation.
6. Heritage will further assure that funded partners are meeting the intent of serving as a focal point under the Older Americans Act by offering the following contractual language.

13.1 Preference

Types. The Subcontractor shall give preference, if allowed by law, to:

- a. Employing persons aged 60 and older.
- b. Persons age 60 or over who are isolated.**
- c. Delivering services under this Agreement to older adults with the greatest economic and/or social need with particular attention to low-income older individuals including low-income minority older individuals, older individuals with limited English proficiency, and older adults residing in rural areas.
- d. Serving elders with the following characteristics in proportion equal to or greater than the proportion residing in the service area who have the same characteristics:
 - Are disabled
 - Are minorities
 - Have incomes at or below the poverty level
 - Are aged 75 and older residing in rural portions of the state
 - Are frail
 - Are American Indians
 - Have limited English proficiency

Written Plan. The Subcontractor shall have, as part of its policies and procedures, a written plan of outreach and service delivery that specifies how the Subcontractor will accomplish ensuring preference with respect to elders with the characteristics set out above.

7. In addition, Heritage will evaluate and consider services and funding in a county.

Emergency Plan and Plan Development Summary

[Insert emergency planning summary as directed in instructions.]

POLICY & PROCEDURES

Subject: Response to Emergency Plan

Date of Adoption: 1/4/2008

Date of Revision: For Board consideration at meeting on 4/10/2025

Date of Review: 3/19/2025

Policy:

Heritage Area Agency on Aging will prepare, assess, respond and recover as quickly as possible to emergency situations that impact older adults, adults with disabilities and family caregivers in Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties as required in §1321.97(3) of Federal Register/Vol.89, No. 31 Rules and Regulations of the Older Americans Act. Such situations can be, but not limited to: severe weather, winter storms, tornados, power outages, floods, terrorist attacks and/or pandemics.

Procedures:

Heritage's Role –

Prior to a natural disaster or other safety-threatening situation, Heritage will encourage and assist older adults, adults with disabilities and family caregivers to plan and prepare for emergencies and natural disasters to improve their safety and ability to be resilient in such situations.

1. Alerting older individuals of the impending danger;
 - a. Consumers served by Care Team members will be made aware of such programs as Alert Iowa, Disaster PrepWise, Smart 911 and other such programs.
 - b. If severe weather is predicted and there is a change that Encore Café may be impacted the following day, staff will make an announcement to diners

and remind them of our cancellation policy and where to check if closures are made.

- c. Encore Café consumers will be educated on the agency's severe weather/closure policies at least annually.
2. Office closures/program adjustments;
 - a. Staff safety is of outmost concern during and after an emergency. Staff member's individual safety of themselves and their families will be priority until it is safe to begin assessment and recovery. There may be times where once the emergency has passed, there isn't much to assess or recover from and in that case regular services will resume. One example is a severe thunderstorm that doesn't cause damage, etc.
 - b. Heritage offices may close, open late or have staff work from home in the event of severe weather or ensure staff safety. This is at the discretion of the Executive Director or designee.
 - c. Management will attempt to reach all staff by phone, text or email to notify them of severe weather, closings or emergencies as soon as possible to check their safety and/or provide any instruction related to office closures or program adjustments.
 - d. Kirkwood Community College may also close or open late campus locations. As our office is housed on Kirkwood campus, Heritage will abide by those adjustments as well.

During/after emergencies, we will coordinate with Federal, local, and State emergency response agencies, service providers, relief organizations, local and State governments, and any other entities that have responsibility for disaster relief service delivery in our response. The ultimate goal is to return service delivery to normal or the new normal as soon as for Heritage eligible individuals impacted. This shall include:

1. Public notifications on will be made on the Heritage website, outgoing phone messages, emails to key contacts, office signage, media alerts, etc. on general announces related to office hours and any program changes.
2. Contract Monitors will reach out to subcontractors to inquire how the emergency is impacting programing and any challenges they are facing. If Heritage can assist, every attempt will be made to do so.
3. When the danger of the emergency has decreased, and it is safe to do so, Heritage will immediately begin to assessing the impact and needs of older individuals after the event occurs; and work to address identified needs through collaboration with other agencies.

To further this purpose, Heritage shall:

- a. Include in the procedures manual established as required in this chapter procedures to respond to emergency or disaster situations;

- b. Include in the development and training plan methods of training for staff, contractors, and other interested parties in response to emergency or disaster situations; and
- c. Include in subcontractor contracts provisions for responding to emergency or disaster situations including, but not limited to, shifting funds from one activity to another or from one contractor to another.
- d. Services: As a part of emergency response, Heritage may plan, coordinate and provide services funded under the programs consistent with responsibilities of an Area Agency on Aging.

Key Partners: Local/county/state emergency management offices (EMA), Public Health, FEMA, Homeland Security, Linn Area Partners Active in Disaster (LAP-AID) and Johnson County Community Organizations Active in Disaster (JCCOAD) and a variety of other community groups, both volunteer and professional.

Types of Emergencies/Disasters: Heritage AAA's Disaster/Emergency Plan is purposefully flexible to allow for this plan to be appropriate and meaningful for all situations such as: inclement weather, severe weather, public health emergencies, natural disasters, nuclear emergencies, economic situations and/or emergencies related to a terrorist attack.

Emergency or Disaster Plan Contents:

- I. Chronology of Response
- II. Disaster Response & Recovery
- III. Agency Personnel Considerations
- IV. Emergency/Disaster Drills
- V. Emergency Management Contacts by County
- VI. Other Important Contact Information for Heritage Director or Acting Director's Use only
- VII. Continuity of Operations Plan
- VIII. All-Hazards Emergency Response Plan

I. Chronology of Response

- a. Planning and Preparation – Heritage works within the community to plan for emergencies with subcontractors, community organizations, emergency officials and other key partners. Heritage actively works to improve the personal preparedness plans of staff, clients, and subcontractors through a

- variety of projects and training. Heritage continually evaluates this plan and requires all subcontractors to have a plan and provide Heritage a copy.
- b. Disaster is declared by local, state, or federal official. Whoever from the staff has been notified of a disaster/event is responsible for immediately informing the Heritage Director or another member of management in his/her absence.
 - c. Director will notify management and communicate with as staff as best as possible.
 - d. Heritage Director or designee contacts Emergency Management Agency (EMA) Coordinator/Director or appropriate key partner in affected county/ies and provides a reminder of the HAAA resources and expertise that are available to assist senior citizens and populations we serve affected by the disaster. In some situations such as power outages, this may not be possible. If so, contacts will be made as soon as it is possible to do so.
 - e. If the EMA Coordinator or other key partner, such as those represented at the Emergency Operations Center (EOC) requests Heritage assistance, the Heritage Director or designee notifies the Chair of Heritage's Board of Directors of potential needs.
 - f. The Heritage Director or designee informs all staff and relevant subcontractors of the Heritage role in disaster response.

Further detail of this section of the plan available upon request.

Communication Strategy

- a. Staff and subcontractors may be activated by Heritage via telephone, email and/or media alert. Subcontractors may also self-activate. This activation process is discussed with subcontractors at the annual mandatory meeting, included in the Heritage contract and discussed at the annual contract review.
- b. The initial contact with staff and subcontractors will always include as clear of a message as possible that addresses:
 - emergency scenario and status,
 - what is currently being done by the aging network,
 - expectations,
 - 24-hour emergency contact information for Heritage,
 - and other information as appropriate.
- c. Coordination of response from Heritage will be from the office located on the Kirkwood Community College campus unless the facility is impacted. If the traditional office is unavailable, disaster response headquarters will be established in conjunction with Kirkwood Community College, the Emergency Management Coordinator or other key partners as needed and appropriate. Staff may be working from home as well.
- d. If possible to make contact with consumers during an emergency, it will be attempted, but in most cases it will not be practical. One example of contacting consumers during an emergency is in the case of pandemics. In those cases,

management will instruct staff how often consumers should be contacted and how to ensure their safety.

Further detail of this section of the plan available upon request.

b) Disaster Response & Recovery

ALERT & NOTIFICATION

Working Hours – Notification

- a. Upon notification, by radio, phone call, or by any other reliable means that a disaster has struck, or is about to strike, whoever from the staff has been so notified is responsible for immediately informing the Director of Heritage.
- b. This step of notifying the Director has priority over any other agency business. Regardless of where the Director is or what activity he/she is engaged in, the Director is to be notified immediately and without hesitation.
- c. In the event the Director cannot be reached, the Integrated Services Director is to be notified of the situation, and will assume the duties of the Director until he/she can be notified and is able to assume direct control.
- d. In the event of the unavailability or incapacity of the Director and the Integrated Services Director, the following succession order shall be followed until a staff member is capable of assuming control of the agency. All staff members included in this emergency succession plan, shall have a copy of this plan and appropriate contact information. It is the staff's responsibility to maintain and be able to locate this information immediately during an emergency.
 - Director
 - Integrated Services Director
 - Community Advancement Director
 - Fiscal Director
 - Community Engagement Coordinator
 - Regional Nutrition Coordinator
 - Elder Rights Coordinator
- e. The Director, or whoever by virtue of the process described above is acting as the Director regarding disaster response, shall notify the Chair of Heritage's Board of Directors when possible of the situation and shall keep him/her informed of all steps planned or undertaken by Heritage in response to the situation.
- f. At this point, the Director or acting director will determine whether or not immediate response is required. This decision can be assisted by contacting contacts listed in Sections V and VI below.

- g. He/she may elect to notify appropriate staff, subcontractors, and/or other key partners using the Communication Strategy described above.

After Hours - - Notification

- a. Upon notification by any reliable means of a disaster within Benton, Cedar, Iowa, Jones, Johnson, Linn and Washington counties, any employee of Heritage shall alert the Director of the situation by calling him/her at home regardless of the hour.
- h. At this point, the Director or acting director will determine whether or not immediate response is required. This decision can be assisted by contacting contacts listed in Sections V and VI below.
- b. He/she may elect to notify appropriate staff, subcontractors, and/or other key partners using the Communication Strategy described above, or may elect to wait until normal working hours.
- c. The above procedure applies during weekends, holidays, before 8:00am and after 4:30 pm on regular business days.

Additional Staff & Alert Notification

- a. The Director will assess as best he/she can the extent of the area involved in the response, and shall implement staff notification procedures based on his/her assessment of need.

Staff Meeting

- a. Staff shall be called together at the discretion of the Director to determine appropriate actions. Directions may also be made via other communications depending on the nature of the disaster and safety of staff.
- b. At this time, if known, the Director will inform the staff of the location of any Disaster Recovery Centers (DRCs) in the region, and will establish the appropriate staffing for the DRCs and/or Heritage programs.
- c. Any and all resources available to Heritage may be reallocated or staff duties may be reassigned temporarily to meet special disaster needs of older adults and other populations we serve.
- d. Formal staff meetings for the purpose of debriefing or of emotional support in nature may be called at the discretion of the Director. Staff are encouraged to support each other and maintain employee morale throughout the crisis with informal debriefings and/or general support.

ASSESSMENT OF NEED

Immediate Response

- a. Assessing impact: The Director, in cooperation with the Emergency Management Coordinator and/or other appropriate emergency officials (Health & Human Services – Aging and Disability Services Division (ADS), Administration on Community Living (ACL), Emergency Management Agencies (EMAs), FEMA, Homeland Security) and other recovery partners, will assess the impact of the disaster upon older adults and populations we serve within the affected area and will instruct appropriate staff and volunteers to determine:
- b. Assessing geographic scope of disaster: Director will need to establish amount of damage to seniors, type of senior impacted (frail, low-income, rural), and information on impact of other populations we serve.
- c. Assessing needs: The next step will be to weigh the needs of seniors impacted in disaster area against agency resources and to begin the recovery process as soon as possible.

Issues to consider:

- Numbers and general location of older adults.
- Urgent and special needs of older adults and populations we serve.
 - What are the new needs? Such as shelters (meal sites, churches, senior centers, volunteers' homes....), food, transportation, and legal assistance with private and governmental agencies (utilities, welfare services, disaster relief service...).
 - What services have been interrupted?
 - What new services have begun? Such as community meals, DRCs, places to wash clothing, heating/cooling stations, etc.
 - What resources are available to access for response/recover? Such as financial assistance, medical support, debris removal, and disaster case management, etc.
- Availability and accessibility of services. Are roads clear? Traffic permitted? Is it safe to use private cars of volunteers? Are LIFTS, SEATS and/or other public transportation in operation?
- Technology access, including phones and internet
- What urgent needs are not being met?
- What needs can HAAA and subcontractors address immediately?
- What is the best way with available systems to communicate information to impacted older adults and other populations we serve?
- Do resources need to be redirected?
- What barriers exist and how can they be removed to get services to seniors as soon as possible?
- Ways to prevent the spread of the disaster impact?
- Long term recovery steps needed?
- d. Director will maintain periodic communication with key partners to offer assistance until the emergency resolves and/or all agency resources are

- depleted or inaccessible. Communication can occur through phone, zoom, email or physical meeting.
- e. The Director may determine that it is necessary to call a meeting with all subcontractors for the purpose of communication, debriefing or recovery planning.

Recovery

- a. Heritage will be involved in the community recovery as resources allow and the need exists. The Director will make staff assignments as appropriate.
- b. The Director will periodically evaluate current efforts in the recovery process to determine if the unmet needs have changed and if the current strategies are effective and to the most benefit of impacted older adults and the aging network.

Issues to consider:

- What current needs have not been met? Barriers?
- Is the impact of the disaster spreading to other areas and negatively affecting the aging network service delivery?
- What if any of those needs or negative impact can Heritage and subcontractors realistically address?
- Are the current communication strategies working for older adults and partners?
- Do resources need to be redirected?
- Long term recovery steps needed?
- When should handoffs or a scaling back of efforts occur?
- How can we better respond or plan for the next emergency?

III. Agency Personnel Considerations

- a. Staff will be trained on the Heritage plan annually. Staff are encouraged to communicate this plan with their family and develop their own family preparedness plan.
- b. In the event of a disaster, the Director or designee will coordinate the agency's response to disaster. The recovery planning shall begin as soon as possible, if not simultaneous.
- c. Employees of Heritage are expected to assist in relief efforts under the supervision of the Director or designee regardless of normal working hours.

Further detail of this section of the plan available upon request.

IV. Emergency/Disaster Drills

Heritage will participate in emergency/disaster drills when notified by the State or other governing unit, implement our plan, and report our action back as requested.

Further detail of this section of the plan available upon request.

V. Emergency Management Agencies Coordinators By County

In case of disasters such as severe weather, tornadoes, chemical spills etc., please contact them immediately at any time day or night. If for some reason there is no answer (telephone lines are inoperable due to weather) contact the State Emergency Management Office at (515) 281-3231. This number is answered 24 hours a day.

Further detail of this section of the plan available upon request.

VI. Other Important Contact Information for Heritage Director Only

Staff listing: all staff are expected to print the staff contact list and have available to them and reprint as updates are completed. It is considered best practice to attach that list to this plan and keep on your person because an emergency usually will impact office access for a period of time. Examples of “on your person” include, a copy in your car, your purse or bag, or at home.

Further detail of this section of the plan available upon request.

VII. Continuity of Operations Plan

Heritage is housed on the Kirkwood Community College (KCC) main campus and uses KCC emails and servers. Our buildings (Heritage East and Heritage West) are part of the KCC Continuity of Operations Plan for all power, electronic and phone systems. Please see www.kirkwood.edu. You may search “emergency plans” and documents are for view. If this is not available, the contact information for both the Kirkwood Community College Vice President of Facilities and Security and the college President are listed in Section V above.

VIII. All-Hazards Emergency Response Plan

Heritage is housed on the Kirkwood Community College (KCC) main campus and adheres to college evacuation, shelter in place, severe weather, safety and facility

plans. Please see www.kirkwood.edu. You may search “emergency plans” and documents are for view. If this is not available, the contact information for both the Kirkwood Community College Vice President of Facilities and Security and the college President are listed in Section V above.

Direct Service Requests

☒ A completed Request to Provide Direct Service form along with efforts to identify service providers has been submitted with the plan for the direct service the agency plans to provide in SFY 2026.

Cost Allocation Plan

- ☒ A Cost Allocation Plan for SFY 2026 - 2029 submitted separately with the SFY 2026 - 2029 Area Plan on Aging.

SFY2026 Estimated Funds Distribution to Prioritized Populations

Please describe how your agency's SFY 2026 Area Plan Budget supports the strategies, activities, and measures to meet the needs of the prioritized populations as outlined for each goal within Section 1.

Goal 1: Maximize Independence

- People with disabilities and older adults have access to high quality, equitable, and person-centered services that maximizes their independence, community integration, and self-sufficiency.

Goal 1: Maximize Independence	Consumers	Budget Amount
Personal Care	4	\$4,000
Homemaker	6	\$4,000
Chore	68	\$91,000
Adult Day Care/Health	25	\$266,627
Case Management	102	\$177,278
Assisted Transportation	75	\$106,613
Transportation	195	\$189,385
Information & Assistance	1,639	\$151,000
Outreach	1,125	\$7,500
Material Aid: Home Mod/Repair	12	\$3,500
Emergency Response System	27	\$6,800
Training & Education	77,636	\$71,250
Options Counseling	267	\$353,503
Material Aid: Asst Tech/Durable Med Equip	24	\$6,500
Material Aid: Consumable Supplies	64	\$16,500
Material Aid: Other	32	\$6,500
		\$1,461,956

Goal 2: Improve Health and Wellness

- Older adults and people with disabilities are empowered to utilize programs that improve their health and wellness.

Goal 2: Improve Health and Wellness	Consumers	Budget Amount
Home Delivered Nutrition	1,687	\$3,451,842
Congregate Nutrition	1,501	\$921,642
Nutrition Counseling	75	\$16,500
Nutrition Education	2,336	\$3,500
Health Promotion Non Evidence-Based	5	\$5,000
Health Promotion Evidence Based	125	\$83,319
		\$4,481,803

Goal 3: Improve Safety and Quality of Life

- Older adults and people with disabilities are safe from all forms of mistreatment and are empowered to improve their quality of life.

Goal 3: Improve Safety and Quality of Life	Consumers	Budget Amount
Legal Assistance	560	\$111,104
EAPA Consultation	125	\$42,000
EAPA Assessment & Intervention	219	\$179,177
EAPA Training & Education	177	\$2,000
		\$334,281

Goal 4: Stay Engaged and Supported

- People with disabilities and older adults are supported by formal and informal caregivers of their choice and have social connections within their communities.

Goal 4: Stay Engage and Supported	Consumers	Budget Amount
Outreach	375	\$2,500
Training & Education	25,879	\$23,750
CG Counseling	25	\$4,000
CG Information Services	550	\$43,100
CG Options Counseling	165	\$77,050
CG Case Management	33	\$42,700
CG Information & Assistance	533	\$50,000
CG Supplemental Services Other	5	\$1,500
CG Respite Care: In-Home	90	\$95,650
CG Respite Care: Out-of-Home (Day)	25	\$175,100
		\$515,350

Funds Transfer Request

☒ A funds transfer has been requested for SFY 2026. Describe how the transfer(s) for Titles III-B, III-C1 or III-C2 address the needs as identified in this plan for SFY2026.

A request has been submitted to transfer 20% of allotted Title IIIB Supportive Services funds to Title IIIC2 Home Delivered Nutrition.

A request has been submitted to transfer 30% of allotted Title IIIC1 Congregate Meals funds to Title IIIC2 Home Delivered Nutrition.

All home delivered nutrition meals are provided through Heritage subcontractors.

Congregate meals are provided through a combination of Heritage subcontractors and Heritage Encore Café/Encore Express programs. Heritage subcontractors complete an annual RFP submittal with award recommendations from the Heritage RFP review committee based on the submitted RFP information, review of past usage and knowledge of the subcontractor/site needs and future plans. The need for Heritage congregate meals is based on projected consumers/meals to be provided. Heritage has identified several service gap areas in the plan and took that into account when projecting the need for both meal services. Funding recommendations are submitted to the Board of Directors for final approval.

“Grab and Go” Meals

☒ Agency **does not** intend to utilize Grab and Go Meals in SFY 2026.

OR

☐ Agency **anticipates** using Title III C-1 funds of up to 25 percent, after all transfers are made, to be used for shelf stable and/or “grab and go” (pick-up, carry-out, drive-through or similar meals) in SFY 2026. Complete the information below to describe how this service delivery approach compliments the Congregate Nutrition program. *Also, ensure within Goal 2, Objective 2.2 that you have selected strategy 2.2c.*

- Provide a description of how shelf stable and/or “grab and go” meals will improve congregate nutrition services, using participation projections based on existing data and how the area agency will track and evaluate the impact on congregate nutrition services:

Click or tap here to enter text.

- Provide eligibility criteria and how populations in greatest economic need and greatest social need will be prioritized for shelf stable and/or “grab and go” meals:

Click or tap here to enter text.

- Provide stakeholder input, including service providers and the public, regarding the need for and provision of shelf stable and/or “grab and go” meals, and how services will be coordinated.

Click or tap here to enter text.