



# **Strategic Plan**

## **State Fiscal Years 2015-2017**

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## Executive Summary

The Iowa Department on Aging's (IDA) vision and priorities for the "Aging of Iowa" are based on the objectives defined in the federal Older Americans Act. The Act directs federal, state, and local governmental entities to ensure older individuals are able to live in the best possible physical and mental health, pursue civic opportunities, and access effective community services of their choosing regardless of economic status. The Act calls upon these entities to ensure older individuals are able to maintain their standard of living through employment or retirement income in the residence of their choice. The Act expects that older individuals will manage their own lives free from abuse, neglect, and exploitation. Finally the Act requires "restorative services" for those needing institutional care and a comprehensive array of long term living and community services to sustain older individuals in their communities and homes, including support to family members and other persons providing voluntary care.

Because Iowans aged 65 and older are one of the fastest growing population groups in Iowa, a strong aging network is vital. While older Iowans share the goal of maintaining their standard of living and independence in their home and community, the supports and services these Iowans need to achieve that goal vary widely. IDA will seek input and assess need through community forums, social media, Area Agency on Aging advisory councils, and partnerships across state and local governmental entities and private corporations with direction from the Governor-appointed Commission on Aging.

IDA is currently building the aging network's capacity and strengthening the provision of home and community based services through the realignment of the Area Agencies on Aging (AAA) and expansion of Lifelong Links, Iowa's Aging and Disability Resource Center (ADRC) system. The Lifelong Links "no wrong door" model will reduce inefficiencies and increase coordination and consistency in service delivery. IDA's older worker employment initiatives will ensure that older Iowans seeking to obtain or retain employment have the supports they need to be successful. An evaluation of the nutrition services and implementation of a healthy behaviors program will help older Iowans improve or maintain their health and well-being. Finally, several initiatives underway in the Office of the State Long-Term Care Ombudsman are aimed at addressing the detrimental impact of elder abuse, neglect, and financial exploitation. These initiatives include a volunteer LTCO program and awareness training for family members, professionals, and providers.

IDA believes that appropriate supports and services not only ensure a high quality of life for older Iowans, but have a positive impact on Iowa's economy and culture. Against this backdrop we submit the FY 2015 – 2017 Strategic Plan that will guide IDA's priorities.

## Vision Statement

Building the best place to live healthier, longer.

## Mission Statement

The mission of the Iowa Department on Aging is to develop a comprehensive, coordinated and cost-effective system of long term living and community support services that help individuals maintain health and independence in their homes and communities.

## Core Functions

**Advocacy:** Advocate for changes in public policy, practices and programs that empower older Iowans, facilitate their access to services, protect their rights and prevent abuse, neglect, and exploitation. Activities may include reviewing and commenting upon all State plans, budgets, and policies which affect older individuals and providing technical assistance to any agency, organization, association, or individual representing the needs of older individuals.

**Planning, Development and Coordination:** Conduct planning, policy development, administration, coordination, priority setting, and evaluation of all state activities related to the objectives of the federal Older Americans Act.

**Health:** Support policies, programs, and wellness initiatives to empower older Iowans to stay active and healthy, and improve their access to affordable, high quality home and community-based services.

# Assessment

## Internal

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### Strengths

- Area Agency on Aging (AAA) planning and service areas restructuring to promote efficient and consistent service delivery statewide based upon local input and assessed needs and priorities.
- Establishment of the statewide LifeLong Links network to provide Iowans with increased access to community-based long term supports and services and planning tools for independence.
- Partnership with Iowa Vocational Rehabilitation Services and the six AAAs to provide targeted employment services to disabled Iowans aged 55 and older.
- Effectively trained and certified Long-Term Care Ombudsman network.
- Establishment of a Volunteer Long-Term Care Ombudsman program.
- Thorough knowledge of needs of older Iowans related to elder rights and abuse issues.
- Departmental personnel skills aligned with tasks needed to modernize Iowa's aging network.
- Improved AAA program monitoring and data collection to support compliance with and performance analyses of Older Americans Act funded services.
- Effective partnerships with other state departments (Department of Transportation, Department of Human Services, Iowa Vocational Rehabilitation Services, and Department of Public Health).
- Effective partnerships with federal agencies:
  - Administration for Community Living (OAA services, ADRC grant, Lifespan Respite grant, and Legal Assistance grant);
  - Veteran's Administration (Veteran Directed – Home and Community Based Services program);
  - Centers for Medicare and Medicaid (Balancing Incentives Payment Program and Medicare Improvements for Patients and Providers Act grant); and
  - Corporation for National & Community Service (VISTA outreach grant).

### Limitations

- The Older Americans Act has not been reauthorized since 2006, and the structure of the Act does not align with current needs and best practices.

- Stagnant federal and state budgets to address increasing numbers of elders and rising costs of doing business.
- Fragmented state system for addressing elder rights and abuse issues and other aging-related issues such as employment.
- Iowans age 60 and older facing involuntary discharges/evictions due to heavy care needs or non-payment for care as a result of exploitation.
- Policy makers continued focus on only Medicaid eligible individuals.

## External

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### Opportunities

- As one of the fastest growing population groups in Iowa, ensure that Iowans aged 65 and older view their home state as a place to thrive.
- Contribute to Iowa's goal of having the best schools in the nation by collaborating with researchers at Iowa's institutes of higher education studying aging trends and needs of older Iowans.
- Help reduce cost of government by supporting person-centered planning that includes private and public pay services available to meet Iowans' independent living goals.
- Help reduce cost of government by engaging citizens to serve as volunteer long-term care ombudsman.
- Help reduce cost of government by supporting efforts across state agencies to address financial exploitation of Iowa's seniors.
- Increase family incomes by promoting older Iowans as knowledgeable, reliable, and experienced employees and business owners to employers and policy makers.

### Challenges

- An increasing percentage of Iowans living in rural areas are aged 65 and older.
- Complexities of elder abuse and exploitation cases and limitations in Iowa's legal system.
- Stagnant funding for Home and Community Based Services not keeping pace with Consumer Price Index (CPI) increases. The mix of increasing costs, decreasing funding, and shifting demographics result in a system that limits options for home and community based services older Iowans need to remain independent and achieve a high quality of life.
- Many older Iowans are finding that they need to remain in the workforce longer and may need to update their skill sets or seek new employment opportunities.
- Lack of statewide, coordinated vision and plan for addressing needs and demands of persons aged 65 and over, who will represent 20% of Iowa population by 2030.

## Goals, Strategies, Measures

**Goal 1: Empower older lowans to make informed decisions about, and easily access, existing health and long-term living community supports and services.**

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**Link to Governor's Goal:** 15% Reduction in the cost of government.

### Strategies

- Expand the LifeLong Links network by establishing a single, toll-free telephone line, a comprehensive web site, and local access points serving as a single entry point for all lowans seeking information about long-term services and supports.
- Ensure AAA Options Counselors are trained to give lowans seeking long-term supports and services the information they need to make informed choices about private and public pay services available to meet their personal independent living goals.
- Ensure family caregivers have access to information on respite and other support services and providers available in their community.

### Measures

- Percent change in number of contacts to LifeLong Links for information and assistance compared to previous year.
- Percentage of lowans seeking information and assistance from LifeLong Links referred to Options Counseling.
- Percentage of lowans seeking information and assistance from LifeLong Links who are caregivers.

**Goal 2: Enable lowans to remain in their own homes and communities with high quality of life for as long as possible through the provision of a diverse menu of long-term living and community support services, including supports for family caregivers.**

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**Link to Governor's Goal:** 15% Reduction in the cost of government.

### Strategies

- Research requirements, processes, and barriers to implementing cost sharing across all OAA services, including HCBS, and state funded programs allocated to the IDA.
- Research outreach strategies, best practices, and service provision data to ensure that service delivery to older individuals with greatest economic or social needs, including rural lowans, are consistent with their representation in the state.

- Expand care transitions partnerships among AAAs and local hospitals and long-term care facilities to ensure lowans have access to support services and providers in their community following hospitalization or rehabilitation.
- Improve access to community support services for Iowa's veterans through the expansion of Veteran-Directed Home and Community Based Services (VD-HCBS) program statewide through VA and AAA collaborations.

#### **Measures**

- Percent change in number of lowans accessing Home and Community Based services through the AAAs compared to previous year.
- Percentage of lowans accessing home and community based services who are in greatest economic or social need in comparison to their representation in the state.
- Average number of months an individual's independent living status is maintained through Case Management services prior to institutionalization or death.
- Percent change in number of veterans accessing VD-HCBS services provided through the AAAs compared to previous year.

### **Goal 3: Empower older lowans to stay active and healthy through Older Americans Act programs and prevention services.**

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**Link to Governor's Goals:** 15% Reduction in the Cost of Government; 25% Increase in Family Incomes

#### **Strategies**

- Implement Fresh Conversations program to improve nutrition, physical activity, and healthy behaviors of older lowans.
- Evaluate congregate meal participant nutrition needs and service satisfaction, and recommend program changes based upon responses.
- Increase outreach and education to employers regarding the employment of older workers.

#### **Measures**

- The percentage of older lowans aged 60 and over determined to be at high nutritional risk that receive home delivered meals, congregate meals, nutrition counseling, and/or nutrition education who maintain or improve their nutrition risk scores.
- The percentage of older lowans aged 60 and over determined to be at high nutritional risk reporting a decrease in impairments in activities of daily living (ADLs).
- Percentage of older lowans enrolled in Senior Community Service Employment Program (SCSEP) achieving permanent employment.

## Goal 4: Ensure the rights of older Iowans and prevent their abuse, neglect, and exploitation.

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**Link to Governor's Goals:** 15% Reduction in the cost of government; 25% Increase in family incomes.

### Strategies

- Continue development of a statewide volunteer ombudsman program with trained volunteers who will perform non-complaint related visits to assist in resolving basic residents' concerns. A volunteer ombudsman program will allow the local Long-Term Care Ombudsman to focus on complaints involving the health, safety, welfare, and rights of residents.
- Educate older Iowans at risk for abuse, their caregivers, and professionals on preventing abuse, neglect, and exploitation.
- Provide mediation training to AAA staff so that they may assist families in conflict.

### Measures

- Percent of long-term care facilities with a volunteer LTCO.
- Percent of complaints resolved in the Long-Term Care Ombudsman program.
- Percent change in number of quarterly non-complaint related visits by the Long Term Care Ombudsman program from previous year.
- Number of individuals participating in elder abuse, neglect, and exploitation trainings and outreach activities compared to previous year.
- Percent of Iowans contacting Iowa Legal Hotline for Older Iowans supported by the AAAs.
- Number of AAA staff participating in mediator training.

## Action Plan

**Goal 1: Empower older Iowans to make informed decisions about, and easily access, existing health and long-term living community supports and services.**

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**Task Leader:** Assistant Director

**Team:** Formed as Needed

**Strategy:** Expand the Lifelong Links network by establishing a single, toll-free telephone line, a comprehensive web site, and local access points serving as a single entry point for all Iowans seeking information about long-term services and supports.

Actions	Staff Responsible	Due Date
Develop and implement branding policies and marketing strategies to promote the LifeLong Links network statewide.	Joe Sample	October 2014
Establish Iowa's quality assurance and improvement framework for the LifeLong Links network and Options Counseling service.	Joe Sample	October 2014 – 2016
Standardize, refine, and expand LifeLong Links intake and referral process for the LifeLong Links toll-free telephone service.	Joe Sample	October 2015
Develop and implement the unified referral and access database and web portal used by all LifeLong Links partner agencies.	Joe Sample	October 2015 – 2016

**Strategy:** Ensure AAA Options Counselors are trained to give Iowans seeking long-term supports and services the information they need to make informed choices about private and public pay services available to meet their personal independent living goals.

Actions	Staff Responsible	Due Date
Develop training schedule for AAA Options Counselors for continuing education on topics such as person-centered planning, issues within the disability community, motivational interviewing, long-term care ombudsman program, public and private pay supports, etc.	Ruth Thompson	October 2014
Develop outcome performance measures to evaluate effectiveness of options counseling services	Ruth Thompson / Shan Sasser	October 2014
Offer monthly continuing education trainings via in-person sessions or webinar.	Ruth Thompson	October 2014 – 2016

**Strategy:** Ensure family caregivers have access to information on respite and other support services and providers available in their community.

Actions	Staff Responsible	Due Date
Build a sustainable Lifespan Respite Coalition of statewide and local providers offering respite services.	Ruth Thompson	July 2014 – 2016
Train appropriate AAA staff on availability of respite service providers in their community and identify possible funding sources for respite services.	Ruth Thompson	July 2014 – 2016
Collaborate with the Lifespan Respite Coalition to develop and target marketing materials on respite and other support services to caregivers.	Ruth Thompson	July 2014 – 2016

**Goal 2: Enable lowans to remain in their own homes and communities with high quality of life for as long as possible through the provision of a diverse menu of long-term living and community support services, including supports for family caregivers.**

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**Task Leader:** Assistant Director

**Team:** Formed as Needed

**Strategy:** Research requirements, processes, and barriers to implementing cost sharing across all OAA services, including HCBS, and state funded programs allocated to the IDA.

Actions	Staff Responsible	Due Date
Provide technical assistance to AAA staff on maximizing cost efficiencies of programs, staff, and other unit costs to ensure adequate resources are available to provide home and community based services.	Joe Sample / Ruth Thompson	July 2014 – June 2017
Review and recommend changes to Iowa Administrative Code to reduce barriers in generating program income, remove outdated language, and allow for the development of new service delivery models.	Brian Majeski	July 2015
Seek guidance from Administration on Community Living on cost-sharing strategies allowable under the Older Americans Act.	Brian Majeski	July 2015

**Strategy:** Expand care transitions partnerships among AAAs and local hospitals and long-term care facilities to ensure lowans have access to support services and providers in their community following hospitalization or rehabilitation.

Actions	Staff Responsible	Due Date
Organize training and technical assistance to AAAs on building care transitions partnerships and referral processes with local hospitals and long-term care facilities.	Ruth Thompson	July 2014 – June 2015
Partner with Iowa's health care providers, such as the Iowa Health Care Collaborative, on working with AAAs on care transitions.	Joe Sample	July 2014 – June 2015

**Strategy:** Research outreach strategies, best practices, and service provision data to ensure that service delivery to older individuals with greatest economic or social needs are consistent with their representation in the state.

Actions	Staff Responsible	Due Date
Provide service trend data to AAAs related to older lowans with greatest economic or social needs accessing AAA services.	Shan Sasser	August 2014
Assist AAAs in developing targeting plans to reach lowans identified as unserved or underserved.	Shan Sasser	December 2014
Review progress toward reaching lowans identified as unserved or underserved.	Shan Sasser	June 2015 June 2016 June 2017

**Strategy:** Improve access to community support services for Iowa's veterans through the expansion of Veteran-Directed Home and Community Based Services (VD-HCBS) program statewide through VA and AAA collaborations.

Actions	Staff Responsible	Due Date
Develop and implement HCBS partnership and referral process pilot program with Heritage AAA and Iowa City Veterans Administration Medical Center.	Ruth Thompson	October 2014
Ensure enrollment in Heritage AAA HCBS program and development of self-directed service plan for participants.	Ruth Thompson	October 2014 – July 2015
Expand AAA and VA partnership to Des Moines Veterans Administration Medical Center.	Ruth Thompson	July 2016 June 2017

## Goal 3: Empower older Iowans to stay active and healthy through Older Americans Act programs and prevention services

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**Task Leader:** Assistant Director

**Team:** Formed as Needed

**Strategy:** Implement Fresh Conversations program to improve nutrition, physical activity, and healthy behaviors of older Iowans.

Actions	Staff Responsible	Due Date
Collaborate with the Department of Public Health (IDPH) to train AAA nutrition coordinators on Fresh Conversations curriculum.	Carlene Russell	July 2014
Collaborate with the Department of Public Health (IDPH) on implementation Fresh Conversations curriculum as pilot programs at 10-15 meal sites in each AAA.	Carlene Russell	October 2014
Collaborate with the Department of Public Health on fidelity checks to ensure nutrition coordinators continue to follow Fresh Conversations curriculum at meal sites.	Carlene Russell	January 2015 – June 2016
Collaborate with the Department of Public Health on development and distribution of Fresh Conversation newsletters and facilitator's guides.	Carlene Russell	January 2015 – June 2016

**Strategy:** Evaluate congregate meal participant nutrition needs and services satisfaction and develop program and recommend program changes based upon responses.

Actions	Staff Responsible	Due Date
Refine existing needs and service satisfaction survey for congregate meal participants.	Carlene Russell	July 2014
Work with AAA meal sites to schedule and collect survey responses.	Carlene Russell	August 2014
Review survey results and collaborate with AAA staff to develop and implement program changes based upon results.	Carlene Russell	October 2014 – June 2015

**Strategy:** Increase outreach and education to employers regarding the employment of older workers.

Actions	Staff Responsible	Due Date
Collaborate with Iowa Vocational Rehabilitation Services and AAA employment specialist in building relationships with employers and referrals of	Suzie Paulson	July 2014 – June 2017

Actions	Staff Responsible	Due Date
qualified older, disabled job seekers.		
Work with contracted Senior Community Service Employment Program (SCSEP) on locating suitable, permanent employment opportunities for program participants.	Suzie Paulson	July 2014 – June 2017
Track employment placement rate among participants, with a special focus on rural participants.	Suzie Paulson	July 2014 – June 2017

## Goal 4: Ensure the rights of older lowans and prevent their abuse, neglect, and exploitation.

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**Task Leader:** State Long-Term Care Ombudsman

**Team:** Formed as Needed

**Strategy:** Develop a statewide volunteer ombudsman program with trained volunteers who will perform non-complaint related visits to assist in resolving basic residents' concerns. A volunteer ombudsman program will allow the local Long-Term Care Ombudsman to focus on complaints involving the health, safety, welfare, and rights of residents.

Actions	Staff Responsible	Due Date
Recruit individuals interested in serving as a volunteer long-term care ombudsman (VLTCO) in their community through RSVP, VISTA, and other volunteer groups, press releases, and partner organization outreach.	Merea Bentrott / Sarah Hinzman	July 2014 - June 2017
Train and certify individuals to perform mandated duties associated with the VLTCO program.	Merea Bentrott / Sarah Hinzman	July 2014 - June 2017
Provide on-going support to VLTCO through continuing education trainings and as needed technical assistance via phone & e-mail.	Merea Bentrott / Sarah Hinzman	July 2014 - June 2017

**Strategy:** Educate older lowans at risk for abuse, their caregivers, and professionals on preventing abuse, neglect, and exploitation.

Actions	Staff Responsible	Due Date
Offer public awareness and education sessions to the general public and providers on topics such as Medicaid issues, fraud avoidance, and signs of abuse, neglect, or exploitation.	Paige Thorson and Linda Hildreth	August 2014 – 2016
Provide training on guardianships and conservatorship to individuals serving in those roles.	Paige Thorson	August 2014 – 2016
Use mobile technology to increase efficiency in accessing	Paige Thorson	August 2014

<b>Actions</b>	<b>Staff Responsible</b>	<b>Due Date</b>
legal information related to prevention of abuse, neglect, and exploitation.		– 2016
Establish partnerships with and provide training to legal professionals on information related to prevention of abuse, neglect, and exploitation.	Paige Thorson	August 2014 – 2016

**Strategy:** Provide mediation training to AAA staff so that they may assist families in conflict.

<b>Actions</b>	<b>Staff Responsible</b>	<b>Due Date</b>
Finalize and produce mediation training materials developed in collaboration with Iowa Association of Mediators and I4A.	Linda Hildreth	July 2014
Provide initial, in-depth mediation training to appropriate AAA staff.	Linda Hildreth	July 2014
Develop training topics and schedule in-person training sessions three times per year for AAA staff for continuing education.	Linda Hildreth	August 2014 - June 2017
Develop mechanisms to evaluate effectiveness of mediation training.	Linda Hildreth	June 2015