



agingWATCH

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Social security benefits to be fully exempt from 2014 Iowa state taxes

Although filing taxes is one of the last things on people's minds this time of year, many older Iowans actually may be looking forward to April 15. That's because all Social Security benefits will be tax-free for Iowa state tax purposes beginning with the 2014 tax year.

In many states, SSDI and SSI income are taxed according to the taxpayer's federally adjusted gross income. While Iowa currently does not tax Social Security income for single taxpayers who earn less than \$25,000 or for joint taxpayers who earn less than \$32,000, it still taxed 11 percent of Social Security benefits for higher-income recipients in the 2013 tax year.

Thanks to a full-benefit exemption phase-in that was enacted with bipartisan support in 2006, the percentage of Social Security benefits exempt from Iowa state taxation has increased from 32 to 100 percent over the past eight years.

When it was initially passed, State Senator David Miller, the floor manager of SF 2408 in the Senate, said of the

legislation, "This bill sends a message that we value and appreciate our seniors. It will help keep our seniors from leaving Iowa for lower-tax states and taking their financial, philanthropic and civic contributions with them."

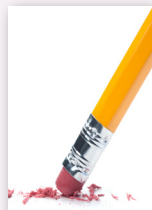
The value older Iowans bring to the state's economy is underscored by the fact that Iowans collected more than \$500 million in Social Security benefits in 2013 (U.S. Social Security Administration). By completely exempting these benefits from state taxes, older Iowans will be able to invest more dollars in their communities and improve the quality of life for all Iowans.

Additionally, this measure will likely increase the number of people who consider living out their golden years in Iowa. Last May, Bankrate ranked Iowa as the ninth best state in the nation in which to retire, based on factors like cost of living, crime rate, quality of health care, state and local tax burden, personal well-being and weather. Perhaps making Social Security benefits fully exempt from state taxes will help bump Iowa into the top five in the 2015 rankings.

WHITE HOUSE CONFERENCE ON AGING

2015 marks the 50th anniversary of Medicare, Medicaid and the Older Americans Act, as well as the 80th anniversary of Social Security. As a result, the White House and key stakeholders are committed to hosting the decennial White House Conference on Aging in 2015 to recognize the importance of these key programs and look ahead to the issues that will help shape the landscape for older Americans in the next decade.

Although definitive dates have not yet been announced, a website at www.whitehouseconferenceonaging.gov has been launched to share news, discuss issues, answer questions and offer those who are interested an opportunity to get involved. Visitors may also subscribe to an e-newsletter to get important updates delivered to their inbox.



CORRECTIONS & CLARIFICATIONS

In the Nov. 14, 2015, issue of *AgingWatch*, we incorrectly reported that House File

2463 mandated the Iowa Department of Human Services to engage stakeholders to develop and submit a Medicaid program state plan amendment to cover home and community-based services.

While this activity was mandated in House File 2463, the provision was eliminated pursuant to the Governor's veto authority.

We also reported that the Legislative Council was directed to establish a committee to study issues related to aging Iowans and long-term care. Although several interim committees were formed, it does not appear action was taken to establish a committee concerning aging Iowans and long-term care.

AgingWatch welcomes comments and suggestions from readers. If errors are brought to our attention, we will attempt to correct them. Messages can be emailed to kimberly.murphy@iowa.gov.

Republicans to represent majority of Iowans in 114th Congress

In the November election, Iowans voted to send a largely Republican delegation to Washington. When the 114th Congress convenes on Jan. 3, all but one of Iowa's six federal representatives, three of them freshmen in the U.S. Senate and House of Representatives, will find themselves in the congressional majority, which means Iowa will still have insider status despite losing some of its seniority. For more information, visit their websites to contact them directly, see what committees they will serve on and learn more about their positions on issues affecting older Iowans.

U.S. Senate

The U.S. Constitution states the U.S. Senate shall be composed of two representatives from each state who serve six-year terms. Every two years, one-third of the Senate's members must be re-elected or vacate their seats at the end of their terms.



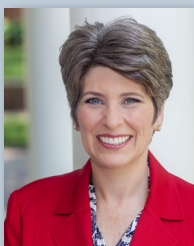
Charles Grassley (R)

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New Hartford, IA

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Joni Ernst (R)

Junior Senator

Red Oak, IA

Official U.S. Senate contact information to be determined

www.joniforiowa.com

U.S. House of Representatives

Also referred to as a congressman or congresswoman, each representative is elected to a two-year term serving the people of a specific congressional district. The number of voting representatives in the House is fixed by law at no more than 435, proportionally representing the population of the 50 states. Currently, there are four delegates representing Iowa.



Rod Blum (R)

District 1

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Federal spending bill offers good news, bad news for older Americans



On Dec. 16, President Barack Obama signed a massive, \$1.1 trillion spending bill to keep the federal government operating over the next nine months. The legislation was a compromise that met resistance from liberals and conservatives alike while successfully curbing the threat of another government shutdown.

Overall, FY 2015 discretionary funding – including that for most programs funded through the Older Americans Act (OAA) – will remain flat at FY 2014 levels. Congressional delegates did recognize a need to support the Elder Justice Act

and appropriated \$4 million in first-time funding for a variety of activities.

Additionally, the bill ensures money from the Prevention and Public Health Fund (PPHF) will be directed to the Administration for Community Living to support chronic disease self-management and falls prevention programs. Lawmakers also rejected funding cuts and structural changes proposed for senior employment services and restored \$1 million for senior transportation activities.

The spending bill failed to provide requested gap-year funding for Aging and Disability Resource Center (ADRC) activities, which are facing a \$10 million shortfall in funding after mandatory program dollars included in the Affordable Care Act expired in September. The bill also did not meet a \$3 million request to fund the White House Conference on Aging, which is slated to be held in 2015.

Looking ahead, both parties appear braced for the continued use of spending bill policy attachments to fund federal agency activities and increase congressional control over executive branch policies. As a result, non-partisan acts that have historically been reauthorized with minimal resistance, like the OAA, face increased hurdles moving forward.

IDA REPORTS ON EFFICACY OF MEAL PROGRAMS FOR OLDER IOWANS



On Dec. 15, the Iowa Department on Aging (IDA) reported its analysis of meal programs coordinated through the state's six Area Agencies on Aging (AAAs) as mandated by HF2463.

Governed by the Older Americans Act, the Nutrition Program coordinated by the AAAs includes a variety of services, including home-delivered meals, congregate meals, nutrition education and nutrition counseling.

The purpose of the program is to reduce hunger and food insecurity; promote socialization of older individuals; and promote the health and well-being of older individuals by assisting them to gain access to nutrition and other disease prevention and health promotion services to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

According to the document published at <https://www.iowaaging.gov/reports>, the AAAs served 37,981 older Iowans in SFY 2014, many of whom demonstrated significant economic and social need:

- 34 percent of meal participants had a household income at or below the federal poverty level.
- 25 percent of participants said they do not always have enough money to buy the food they need.
- 51 percent of participants lived alone.
- 34 percent of meal participants lived in a rural area.
- 67 percent of participants were 75 years of age or older.

New website focuses on elder justice

The U.S. Department of Justice recently launched a new website to serve as a resource for victims of elder abuse and exploitation and their families; aging network professionals; law enforcement agencies and prosecutors; and researchers interested in understanding and addressing elder abuse.

The Elder Justice Initiative at www.justice.gov/elderjustice includes a list of frequently asked questions, fact sheets, training videos, a press room and a



searchable database to find assistance close to home.

New WIOA legislation promotes job-skills training among individuals with disabilities while moving program oversight to ACL

Last July, the Workforce Innovation and Opportunities Act (commonly referred to as WIOA) was passed by Congress and subsequently signed by the President. The legislation amends and reauthorizes the Workforce Investment Act of 1988 (WIA) and aims to create efficiencies in the workforce development system.

One key mandate of WIOA moves oversight of the Independent Living Program – which is designed to empower individuals with disabilities and integrate them into mainstream society – from the Rehabilitation Services Administration under the U.S. Department of Education to the Administration for Community Living (ACL) under the U.S. Department of Health and Human Services. This aligns with the ACL's work with the Older Americans Act that serves to enhance quality of life for older individuals by helping them live independently in the communities of their choice.

In Iowa, these efforts are supported by the Senior Community Services Employment Program (SCSEP), which helps unemployed Iowans over the age of 55 gain marketable job skills working on a part-time basis in non-profit and public organizations. Funded by a grant from the U.S. Department of Labor and managed by the Iowa Department

on Aging (IDA), SCSEP focuses on the collaboration of partners, like Iowa Vocational Rehabilitation, to ensure that older Iowans and Iowans with disabilities receive training that will enhance their employment opportunities.

Like SCSEP, WIOA emphasizes skills development over job placement by specifically increasing access for individuals with disabilities to high-quality workforce services that will prepare them for competitive, integrated employment.

The IDA is working closely with the Governor's office and Iowa Workforce Development (IWD) to create a collaborative approach to implementing WIOA in Iowa. IWD has created a page on its website devoted to WIOA and its impact and implementation in Iowa (<http://www.iowaworkforce.org/centers/wioa.htm>), while other stakeholders are meeting to identify ways to better engage prospective employers and develop skills training for individuals that will meet current and future job needs.

A full summary of the WIOA legislation is available at <http://www.doleta.gov/wioa/pdf/WIOA-Factsheet.pdf>. Additionally, more information will be available in future issues of *AgingWatch*.

2015 IOWA LEGISLATIVE SESSION TIMETABLE

(SESSION TIMETABLE IS SUBJECT TO CHANGE)

JANUARY 12:

First day of session
Iowa Code Sec. 2.1

FEBRUARY 13 (Friday of the 5th Week):

Final day for individual Senator and Representative requests for bill drafts to the Legislative Services Agency
Senate Rule 27 and House Rule 29

MARCH 6 (Friday of the 8th Week):

Final day for Senate bills to be reported out of Senate committees and House Bills out of House committees
Joint Rule 20

MARCH 16-20 (10th Week):

Senate only considers Senate bills and unfinished business; House only considers House bills and unfinished business
Joint Rule 20

MARCH 23 – APRIL 3 (11th and 12th Weeks):

Debate not limited by rule

APRIL 3 (Friday of the 12th Week):

Final day for Senate bills to be reported out of House committees and House bills out of Senate committees
Joint Rule 20

APRIL 6-10 (13th Week):

Senate only considers House bills and unfinished business; House only considers Senate bills and unfinished business
Joint Rule 20

APRIL 13 (Beginning of the 14th Week):

Amendments need not be filed on the day preceding floor debate
House Rule 31.8



Primarily, only the following bills are eligible for consideration:

- Bills passed by both Houses
- Appropriations Bills



Joint Rule 20

MAY 1 (110th Calendar Day of the Session):

Per diem expenses end
Iowa Code Sec. 2.10(1)

Labor Force Participation Rate		
	Nov. 2013	Nov. 2014
PWD 	30.7	30.4
	% change: -0.8	
PWOD 	75.9	76.3
	% change: +0.5	

PWD = People with Disabilities; PWOD = People without Disabilities

Employment-Population Ratio		
	Nov. 2013	Nov. 2014
PWD 	26.5	26.9
	% change: +1.4	
PWOD 	71.0	72.2
	% change: +1.7	

Source: Kessler Foundation and University of New Hampshire. "nTIDE Jobs Report: Positive Jobs Picture Brightens Outlook for People with Disabilities." (Dec. 5, 2014).

A guide to understanding the Office of Substitute Decision Maker

In the Nov. 14 issue of AgingWatch, we reported that the Iowa Department on Aging (IDA) received funding last session through the Health and Human Services Budget Bill (HF2463) to re-establish the Office of Substitute Decision Maker (OSDM).

Reestablishing the OSDM is significant for older Iowans because it ensures support is available for individuals in need of the substitute decision-making services of a guardian, conservator, representative payee, attorney-in-fact or personal representative.

Below is a list of frequently asked questions the IDA regularly receives about the OSDM:

Q: What is the Office of Substitute Decision Maker (OSDM)?

A: The OSDM was created by Iowa Code 231E as an entity that serves as a duly appointed substitute decision maker if no other individual or entity is willing or able to serve in that capacity. Along with this integral service component, the OSDM also provides information, education and referrals regarding substitute decision making and the issues that accompany this area.

Q: What does substitute decision making include?

A: Substitute decision making ranges from guardianships/conservatorships and power of attorney to representative payee/VA Fiduciary and personal representative of an estate.

Q: What operations are currently being performed by the OSDM?

A: The OSDM has begun to re-establish its operational structure and processes. Meetings have been held and continue to occur with stakeholders and service providers to re-introduce and re-engage the office.

The OSDM also has been providing technical assistance to individuals from across the state regarding services the OSDM provides, responsibilities of guardians/conservators/powers of attorney and other substitute decision making issues.

Additionally, the OSDM is refreshing and updating informational/educational resources to provide to the public and service providers and is investigating the availability and use of volunteers to assist local substitute decision making offices and identifying ways to effectively integrate these volunteers into services provided by local offices.

Q: What is the OSDM doing in regards to the creation of local offices?

A: The OSDM is currently collecting data and information regarding the possible structure and scope of the service model of local substitute decision making offices. Reviews of comparable programs from across the country are occurring in order to identify best practices for creating and supporting local offices.

Q: Does the OSDM plan on creating any type of “brick and mortar” projects in connection to the local offices?

A: No, the OSDM does not anticipate any capital projects associated with the development of local offices.

Q: When will the OSDM “open” to the public?

A: The OSDM will launch a public awareness campaign once the office’s foundation is in place and services can be provided effectively without interruption to consumers. In the interim, technical assistance will continue to be provided in response to all inquiries the OSDM receives.



AgingWatch is provided in the spirit of information and education. The opinions expressed by the contributors do not necessarily reflect those of the Iowa Department on Aging or its programs. The Iowa Department on Aging shall not be liable for any damages that may result from errors or omissions in information distributed in this publication.

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