



South Carolina  
**DEPARTMENT  
ON AGING**

# Area Agency on Aging Area Plan Workbook 2023-2025

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## I. Message from the State Director

Dear Colleagues:

I would like to take this opportunity to thank you and your staff for the work that you do to serve the older population and caregivers of South Carolina. The role of the aging network has grown substantially and is being recognized as a key network to address social determinants of health, health disparities, and an important partner in health care and long-term care reform. To truly create meaningful enhancements for programs and services, and to meet the needs of an increasingly diverse population, creative planning is imperative.

I am pleased to present the Area Agencies on Aging Area Plan Instructions, as well as its accompanying Workbook for the period July 1, 2023–June 30, 2025. The 2023-2025 Area Plan is designed to guide service delivery and policy development throughout the state. The Area Plans, along with its regional analysis and strategic planning, will form the basis for statewide vision and prioritizing to best serve future generations and to establish benchmarks to measure effectiveness and efficacy.

I am proud to be a part of a network dedicated to serving older adults and welcome your continued involvement as we work together to respond to challenges and opportunities in the years ahead.

Sincerely,



Connie D. Munn, MSW

## II. Overview

The Area Plan is a public document that should present essential information clearly, and should be easily understood by the public and aging network partners. The document shall be written using concise sentences and paragraphs, as well as clearly defined charts, graphs, and diagram legends.

The Area Plan should be reflective of the actual activities and services provided in the planning and service area, the operations of the PSA and AAA/ADRC, and of the long range planning and forecasting for the aging network in the region.

### A. Purpose

The Area Plan serves multiple purposes:

- **Documenting** the tangible outcomes planned and achieved as a result of a region's long-term care reform efforts.
- **Translating** activities, data, and outcomes into proven best practices, which can be used to leverage additional funding.
- **Providing a Blueprint** that spells out the coordination and advocacy activities the AAA will undertake to meet the needs of older adults, including integrating health and social services delivery systems.
- **Building Capacity** for long-term care efforts in the planning and service area.

The AAA should succinctly incorporate into the Area Plan as many of its activities related to aging as possible, regardless of funding source. The plan should serve as a valuable tool for planning/tracking all efforts on behalf of older adults.

### B. Focuses

The Area Plan must include measurable objectives that address all of the focus areas, 1-4, below. In developing objectives, consider the role these areas serve in optimizing the AAA's long-term services and supports system (LTSS) for older adults and their caregivers.

1. Older Americans Act (OAA) Core Programs Focus Area  
OAA core programs are encompassed in Titles III, VI, and VII, and serve as the foundation of the national aging services network.
  - Coordinating Title III programs with Title VI Native American programs;
  - Strengthening and/or expanding Title III & VII services;
  - Supporting families and caregivers;
  - Increasing the business acumen of aging network partners;
  - Working towards the integration of health, health care and social services systems, including efforts through contractual agreements; and

- Integrating core programs with ACL's Discretionary Grants.
2. ACL Discretionary Grants & Other Funding Sources Focus Area- SHIP, MIPPA, Senior Medicare Patrol (SMP), Evidence-Based Disease and Disability Prevention Programs, Nutrition Innovations, No Wrong Door, and other programs that support community living.
    - Integrating ACL Discretionary Grants with OAA core programs;
    - Age and Dementia friendly efforts;
    - Social determinants of health efforts; and
    - Incorporating aging network services with other home and community based services.
  3. Participant-Directed/Person-Centered Planning Focus Area- Making fundamental changes in programs which support consumer control and choice is recognized as a critical focus. OAA Title VII programs and services are designed to support this effort. Opportunities also exist for maximizing consumer control and choice in Title III and VI programs. The Plan should address activities to support these goals.
    - Supporting participant-directed/person-centered planning for older adults and their caregivers across the spectrum of long term care services, including home, community, and institutional settings; and
    - Connecting people to resources.
  4. Elder Justice Focus Area- This area focuses on coordinated programs and services for the protection of vulnerable adults under Title VII of the OAA.
    - Preventing, detecting, assessing, intervening, and/or investigating elder abuse, neglect, and financial exploitation;
    - Protecting rights and preventing abuse; and
    - Supporting and enhancing multi-disciplinary responses to elder abuse, neglect, and exploitation involving adult protective services, LTC ombudsman programs, legal assistance programs, law enforcement, health care professionals, financial institutions, and other essential partners.

### III. Content Instructions

#### A. Executive Summary

The Executive Summary should provide a high-level, narrative overview of the plan content, summarizing the region's planned efforts on behalf of older individuals. This summary should include the agency's mission and vision statements. A well-written summary can aid the region in educating the public, lawmakers, and other agencies, and can assist in securing additional resources.

#### B. Context

The context sets the stage for the Area Plan and describes the issues to be addressed in the rest of the document. A summary of needs assessment activities undertaken by the region, as well as the findings of such activities, should be included here. Further, the findings should correspond to the outlined goals and objectives in Section III-D.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

*\*\*A link will be provided/where to find the chart.*

Provide a narrative overview of the AAA Planning Service Area (PSA) to include:

- Identification of counties in the PSA as well as demographical information for OAA targets.
- Population trends and other issues impacting older South Carolinians in the PSA
- A summary of services currently provided by completion of Current Service Coverage Charts.
- A description of programs and services offered in the region that go beyond "traditional" service delivery. The narrative should include information about the unique person-centered programs that are currently offered to: maintain health and independence, promote access to a portfolio of services, assist those with functional needs, etc. This description should include the funding source utilized, i.e. OAA Title III, Home and Community Based Services, American Rescue Plan, Community Development Block Grants, etc. and if the project is a pilot.
- A summary of the process used to assess service gaps, prioritize needs and develop a comprehensive and coordinated plan. Fundamental processes include conducting a needs assessment, obtaining public and partner feedback, reviewing community health needs assessments, facilitating focus groups with minorities and diverse populations, an analysis of census data, GIS analysis, and regional demographic data, as well as input from Regional Aging Advisory Councils, etc.

## Current Service Coverage Charts

An "X" indicates the service is offered in the county listed.

Supportive Services	[COUNTY 1]	[COUNTY 2]	[COUNTY 3]	[COUNTY 4]	[COUNTY 5]	[COUNTY 6]
Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Congregate						
Medical	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Homecare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Care						
Homemaker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Minor Home Repair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information & Referral	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Nutrition Services	[COUNTY 1]	[COUNTY 2]	[COUNTY 3]	[COUNTY 4]	[COUNTY 5]	[COUNTY 6]
Congregate Meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Delivered Meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Delivered Meals (Family Caregiver)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nutrition Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nutrition Counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Health Promotion Services	[COUNTY 1]	[COUNTY 2]	[COUNTY 3]	[COUNTY 4]	[COUNTY 5]	[COUNTY 6]
Evidenced-Based Programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Promotion & Disease Prevention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Family Caregiver	[COUNTY 1]	[COUNTY 2]	[COUNTY 3]	[COUNTY 4]	[COUNTY 5]	[COUNTY 6]
Information & Assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplemental Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



### **C. Quality Assurance Process**

The quality assurance process of service programs encompasses three functions: data collection to assess ongoing program implementation, remediation of problem areas, and continuous improvement. Describe any quality assurance activities that will be undertaken during the Plan period.

In addition, include the following information:

- Describe how members of the public may obtain your agency's grievance procedures related to service provision.
- Describe how members of the public may obtain minutes of your agency's Boards and Councils.
- Describe how to obtain the schedule and process of your agency's updating of internal policies.

### **D. Goals, Objectives, and Performance Measures**

Goals are visionary statements that describe the strategic direction in which the region is moving. Objectives are the attainable, specific, and measurable steps the region will take to achieve its goals. Strategies outline how the region will achieve the goals and objectives. Regions should have at least one goal, objective, strategy, and performance measure for each of the four Area Plan focus areas listed in Section II-B of the Area Plan Workbook. State plan goals and objectives have been added to the required chart. It is expected that the AAA will add its own goals, objectives, and performance measures to meet the needs and planning for its region and to enhance the vision of the statewide aging network.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

*\*\*A link will be provided/where to find the chart.*

# Goals, Objectives, Performance Measures, Strategies, and Performance Measures

<b>State Plan Goal 1</b>	Maintain effective and responsible management of Older Americans Act (OAA) services offered through the Department on Aging (SCDOA) and within the 10 service regions in South Carolina.
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<b>State Plan Objective 1.1</b>	Evaluate, monitor, and modify aging service programs to maximize the number of people served with state and federal funding, and to ensure programs and services are cost effective and meet best practices, as well as to achieve greater accountability and transparency.
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Annual Performance Measures
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State Plan – SCDOA and AAAs conduct needs assessments to evaluate state and regional concerns and service demands.
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State Plan – AAAs submit Quality Assurance Reports to SCDOA annually.
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Strategies and Actions
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Challenges and Barriers
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<b>State Plan Objective 1.2</b>	The client assessment program is the gateway to most services provided by the Aging Network. An assessment is necessary to determine a client's eligibility for services and it determines the level of need by establishing a priority score. The AAAs are responsible for conducting client assessments in their respective regions, thereby ensuring greater accountability and providing a holistic approach to how each client is matched to services.
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Annual Performance Measures
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State Plan – Expand the number of seniors assessed annually by 5% or as needed.
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State Plan – Decrease the number of seniors on waiting lists for services. (It should be noted that regional waiting lists can be a result of many factors, including funding and/or lack of capacity in rural areas.
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Strategies and Actions
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Challenges and Barriers

Regional Objective	
Annual Performance Measures	
Strategies and Actions	
Challenges and Barriers	

Regional Objective	
Annual Performance Measures	
Strategies and Actions	
Challenges and Barriers	

<b>State Plan Goal 2</b>	Empower older adults and persons with disabilities, their families, caregivers, and other consumers by providing information, services, education, and counseling on their options to live as independently as possible in the community.
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<b>State Plan Objective 2.1</b>	<b>Information and Referral/Assistance (I&amp;R/A); SC ACT</b>
Annual Performance Measures	
State Plan – Increase the number of contacts accessing I&R/A services by 5% annually.	
State Plan – Increase the I&R/A outreach by 5% annually.	

Strategies and Actions	
Challenges and Barriers	

<b>State Plan Objective 2.2</b>	<b>Insurance and Medicare Counseling</b>
Annual Performance Measures	
State Plan – Increase by 5% annually, the number of older adults and adults with disabilities enrolled in prescription drug coverage that meets their financial and health needs.	
State Plan – Increase by 5% annually, the number of beneficiaries who contact the SHIP program for assistance.	
State Plan – Three regional outreach events pare required per quarter (36 annually).	
State Plan – Increase by 5% annually, the number of consumers and caregivers receiving SMP counseling.	
State Plan – Increase by 5% annually, the number of consumers reached in rural, isolated areas.	
State Plan – Increase by 5% community partnerships to assist in raising awareness of fraud.	
Strategies and Actions	
Challenges and Barriers	

**State Plan Objective 2.3** Nutrition Program and Services

**Annual Performance Measures**

State Plan – Track and identify service gaps for Congregate and Home delivered meal services.

**Strategies and Actions**

**Challenges and Barriers**

**State Plan Objective 2.5** Evidence-Based Health Promotion and Disease Prevention Programs

**Annual Performance Measures**

State Plan – Track and identify service gaps for Evidenced-Based Health Promotion and Disease Prevention Programs including their causes and geographic distribution.

**Strategies and Actions**

**Challenges and Barriers**

**State Plan Objective 2.6** Transportation Services

**Annual Performance Measures**

State Plan – Increase the number of clients utilizing transportation services by 5% annually, depending on available funding sources.

**Strategies and Actions**

Challenges and Barriers

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State Plan Objective 2.7

Family Caregiver Support Program

Annual Performance Measures

State Plan – Expand the number of family caregiver support recipients by 5% annually.

State Plan – Increase outreach events by 5% annually.

State Plan – Increase utilization of the Seniors Raising Children funding by 5%.

State Plan – Increase partnerships and collaboration with other human-service agencies by 3%.

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Strategies and Actions

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Challenges and Barriers

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State Plan Objective 2.10

Home Care

Annual Performance Measures

State Plan – Increase the number of seniors receiving home care services by 5% annually.

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Strategies and Actions

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Challenges and Barriers

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State Plan Objective 2.11	Minor Home Repairs
Annual Performance Measures	
State Plan – Increase the number of seniors receiving home repair services by 5% annually.	
Strategies and Actions	
Challenges and Barriers	

Regional Objective	
Annual Performance Measures	
Strategies and Actions	
Challenges and Barriers	

Regional Objective	
Annual Performance Measures	
Strategies and Actions	

Challenges and Barriers

**State Plan Goal 3**

Ensure the rights of older adults and persons with disabilities and prevent their abuse, neglect, and exploitation through the State Long Term Care Ombudsman Program, and elder abuse awareness and prevention activities including legal services and the Vulnerable Adult Guardian ad Litem program.

**State Plan Objective 3.2** Legal Assistance Program

Annual Performance Measures

State Plan – Increase the number of outreach activities directed at the most vulnerable senior victims of abuse, neglect, and exploitation.

State Plan – Increase the number of formalized partnerships between aging/disability and elder rights groups.

State Plan – Develop and implement a continuous quality improvement component within the program.

Strategies and Actions

Challenges and Barriers

**State Plan Objective 3.3** Long Term Care Ombudsman Program

Annual Performance Measures

State Plan – Increase and efficiently track the resident satisfaction outcomes and complaint resolution rate by 5% annually.

State Plan – Increase the number of quarterly visits to facilities by Ombudsmen representatives by 5% annually.

State Plan - Increase the number of trained Volunteer Ombudsmen by 5% annually.



State Plan – Each local Ombudsman program will conduct eight educational trainings for residents/families on long-term care services and/or developing self-advocacy skills.

State Plan – Improve targeted educational activities that raise awareness of the Ombudsman program in the communities by 5% annually.

State Plan – Expand the number of Resident and Family Councils by 5% annually.

Strategies and Actions

Challenges and Barriers

Regional Objective

Annual Performance Measures

Strategies and Actions

Challenges and Barriers

Regional Objective

Annual Performance Measures

Strategies and Actions

**Challenges and Barriers**

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**Regional Goal**

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**Regional Objective**

**Annual Performance Measures**

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**Strategies and Actions**

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**Challenges and Barriers**

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**Regional Objective**

**Annual Performance Measures**

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**Strategies and Actions**

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**Challenges and Barriers**

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**Regional Goal**

**Regional Objective**

**Annual Performance Measures**

**Strategies and Actions**

**Challenges and Barriers**

**Regional Objective**

**Annual Performance Measures**

**Strategies and Actions**

**Challenges and Barriers**

## E. Long Range Planning

This section of the Area Plan should address how well the aging network is prepared in the planning and service area for the next ten years. This will help identify future needs as required by the Area Plan instructions for your region, but will also inform areas that may require focus for the Master Plan on Aging in South Carolina.

- The AAA should address the changing demographics focusing on the varied population shifts and growing cultural diversity in the communities throughout the region. Describe any planning efforts, as well as activities being implemented in response to these projected changes.
- Provide an analysis of how programs, policies, and services for your region can be improved and resource levels be adjusted to meet the needs of the changing population in the planning and service area. Describe the anticipated impacts and reactions to these demographic and economic challenges. How is your area planning for sustainability?
- What recommendations would you make in an effort to build capacity to meet the needs of older individuals for:
  - Transportation services;
  - Nutrition services;
  - Information and referral;
  - Affordable housing;
  - Medical facilities;
  - Mental health facilities
  - Workforce availability;
  - Long term care systems;
  - Service expectations of seniors and caregivers;
  - Distribution of existing resources;
  - Creation of new resources;
  - Policy changes;
  - Legal assistance
  - Development and location of multipurpose senior centers
  - Emergency Preparedness

## IV. Submission Instructions

### A. Area Plan Important Dates

Area Plan Instructions Release Date	November 1, 2022
Area Plan Workshop #1	November 10, 2022
Area Plan Workshop #2	January 2023 (TBD)
<b>Area Plan Submission Due Date</b>	<b>C.O.B on March 1, 2023</b>
Virtual Presentation Schedule	March 15, 2023 - April 14, 2023
SCDOA Review Schedule	April 17, 2023 – May 12, 2023
Approval of Area Plans Date	May 15, 2023

## B. Formatting Requirements

- The Area Plan document will be required to include a Table of Contents with page numbers.
- Include a footer listing the name of the Document, Name of AAA/Region, year of plan, and page number. For example:

*Area Plan\_AAA/Region Name\_2023-2025* 1

- It is required to use the charts provided by SCDOA where requested.
- You are encouraged to use pictures to help enhance the impact of your services when appropriate.

## C. Electronic Submission

- Area Plans must be submitted in PDF format to [PSAHelp@aging.sc.gov](mailto:PSAHelp@aging.sc.gov).
- Signature forms must include a written signature and be submitted as an additional document along with the completed Area Plan.
- The electronic submission should include the following documents:
  - Completed Area Plan Document - PDF
  - Signature Forms with written signature (2) - PDF
  - Other forms and charts as required - PDF

## D. Presentation

- A virtual presentation of your Area Plan will be required as part of the approval process. Presentations should be 30 minutes and allow an additional 15 minutes for questions.
- Presentations will take place March 15<sup>th</sup> through April 14<sup>th</sup>.
- Plans will not be approved without a virtual presentation.

## V. Attachments

**Attachment A - Verification of Intent (VOI)** – The Area Plan must be signed by the Board of Directors Chairperson, Planning Service Area Director, and the Area Agency on Aging Director

**Attachment B - Assurances** – Area Plan Assurances and Activities includes statutory assurances and activities related to the development and implementation of area plans, and must be reviewed, signed, and included as part of the Area Plan submission.

**Attachment C - Information Requirements** – Information requirements includes specific information requirements related to development and implementation of the

area plan. The region's responses to these requirements must be listed within the attachment and submitted as part of the Area Plan.

**Attachment D - Programmatic Questions** – The AAAs should answer each of the programmatic questions based on the needs of its region and any plans to address the challenges that may be presented. The region's responses to these requirements must be listed within the attachment and submitted as part of the Area Plan.

**Attachment E - Performance Measures Template** – For any performance measures identified that have quantifiable data, add the performance measure and data source to the provided document. Then begin to add the numbers and goals to the appropriate areas.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

**Attachment F - Organizational Information** – Organizational information will be provided as part of the Area Plan. This will include an organizational chart, as well as, information about staffing responsibilities.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

**Attachment G – Regional Aging Advisory Council (RAAC)** – The AAA will provide required information about its RAAC, its composition, structure, and operations.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

**Attachment H – Mapping** – County maps showing clients for defined services will be provided as part of the Area Plan. The maps are to be overlaid with the low-income senior target population. The attachment will also contain a table of the key target populations based on the Older Americans Act.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

**Attachment I – Fiscal** – The AAA will provide a response (narrative or other appropriate format) to the Fiscal questions provided in this section.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

**A. Attachment A – Verification of Intent (VOI)**

The Area Agency on Aging hereby submits its Fiscal Year 2023 – 2025 Area Plan to the South Carolina Department on Aging (SCDOA). If approved, the plan is effective for the period of July 1, 2023 through June 30, 2025.

The Area Agency on Aging is granted the authority to develop and administer its Area Plan in accordance with all requirements of the Older Americans Act and the SCDOA. By signing this plan, the Planning and Service Area Director and the Area Agency on Aging Director assure that the written activities included in the plan will be completed during the effective period and annual updates will be given to the SCDOA when requested. Changes made to the approved plan will require an amendment submission to the SCDOA for approval.

This plan contains assurances that it will be implemented under provisions of the Older Americans Act, as amended in 2016, during the period identified, as well as the written requirements of the SCDOA and the South Carolina Aging Network’s Policies and Procedures Manual.

The Area Plan herewith submitted was developed in accordance with all federal and state statutory and regulatory requirements.

\_\_\_\_\_  
**Board of Directors Chairperson**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Planning Service Area Director**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Area Agency on Aging Director**

\_\_\_\_\_  
**Date**

## **B. Attachment B – Assurances**

### **AREA PLAN ASSURANCES AND REQUIRED ACTIVITIES by the Older Americans Act, As Amended in 2016**

#### **(Copied from the ACL State Plan Instructions)**

The Older Americans Act (OAA) requires the South Carolina Department on Aging (SCDOA) to make assurances in its State Plan that the conditions of the OAA are strictly followed and executed in the State of South Carolina.

As an Area Agency on Aging in South Carolina, your organization is responsible for implementing the requirements of the OAA as stipulated in these assurances. The AAA also commits to supporting the SCDOA in the delivery of aging services based on the stipulations set forth by the South Carolina Aging Network's Policies and Procedures Manual.

### **ASSURANCES**

#### **Sec. 305(a) - (c), ORGANIZATION**

(a)(2)(A) The State agency shall, except as provided in subsection (b)(5), designate for each such area (planning and service area) after consideration of the views offered by the unit or units of general purpose local government in such area, a public or private nonprofit agency or organization as the area agency on aging for such area.

(a)(2)(B) The State agency shall provide assurances, satisfactory to the Assistant Secretary, that the State agency will take into account, in connection with matters of general policy arising in the development and administration of the State Plan for any fiscal year, the views of recipients of supportive services or nutrition services, or individuals using multipurpose senior centers provided under such plan.

(a)(2)(E) The State agency shall provide assurance that preference will be given to providing services to older individuals with greatest economic need and older individuals with greatest social need, (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) and include proposed methods of carrying out the preference in the State plan;

(a)(2)(F) The State agency shall provide assurances that the State agency will require use of outreach efforts described in section 307(a)(16).

(a)(2)(G)(ii) The State agency shall provide an assurance that the State agency will undertake specific program development, advocacy, and outreach efforts focused on the needs of low-income minority older individuals and older individuals residing in rural areas.

(c)(5) In the case of a State specified in subsection (b)(5), the State agency and area agencies shall provide assurance, determined adequate by the State agency, that the area agency on aging will have the ability to develop an area plan and to carry out, directly



or through contractual or other arrangements, a program in accordance with the plan within the planning and service area.

**NOTE: STATES MUST ASSURE THAT THE FOLLOWING ASSURANCES (SECTION 306) WILL BE MET BY ITS DESIGNATED AREA AGENCIES OR AGENCIES, OR BY THE STATE IN THE CASE OF SINGLE PLANNING AND SERVICE AREA STATES.**

Sec. 306(a), AREA PLANS

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

- (A) services associated with access to services (transportation, health services (including mental health services), outreach, information and assistance (which may include information and assistance to consumers on availability of services under part B and how to receive benefits under and participate in publicly supported programs for which the consumer may be eligible), and case management services);
- (B) in-home services, including supportive services for families of older individuals who are victims of Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and legal assistance; and assurances that the area agency on aging will report annually to the State agency in detail the amount of funds expended for each such category during the fiscal year most recently concluded.

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

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

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

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

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

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

(II) to the maximum extent feasible, provide services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; and

(III) meet specific objectives established by the area agency on aging, for providing

services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area; and

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

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

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

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

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

(I) older individuals residing in rural areas;

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

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

(IV) older individuals with severe disabilities;

(V) older individuals with limited English proficiency;

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

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

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

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

(6)(F) Each area agency will:

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

(9) Each area agency on aging shall provide assurances that the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 307(a)(9), will

expend not less than the total amount of funds appropriated under this Act and expended by the agency in fiscal year 2000 in carrying out such a program under this title.

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

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

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

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

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

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

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

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

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

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

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

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

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

(A) to provide benefits and services to older individuals, giving priority to older individuals identified in paragraph (4)(A)(i); and

(B) in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;

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

## Sec. 307, STATE PLANS

(7)(A) The plan shall provide satisfactory assurance that such fiscal control and fund accounting procedures will be adopted as may be necessary to assure proper disbursement of, and accounting for, Federal funds paid under this title to the State, including any such funds paid to the recipients of a grant or contract.

(7)(B) The plan shall provide assurances that--

(i) no individual (appointed or otherwise) involved in the designation of the State agency or an area agency on aging, or in the designation of the head of any subdivision of the State agency or of an area agency on aging, is subject to a conflict of interest prohibited under this Act;

(ii) no officer, employee, or other representative of the State agency or an area agency on aging is subject to a conflict of interest prohibited under this Act; and

(iii) mechanisms are in place to identify and remove conflicts of interest prohibited under this Act.

(9) The plan shall provide assurances that the State agency will carry out, through the Office of the State Long-Term Care Ombudsman, a State Long-Term Care Ombudsman program in accordance with section 712 and this title, and will expend for such purpose an amount that is not less than an amount expended by the State agency with funds received under this title for fiscal year 2000, and an amount that is not less than the amount expended by the State agency with funds received under title VII for fiscal year 2000.

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

(11)(A) The plan shall provide assurances that area agencies on aging will--

(i) enter into contracts with providers of legal assistance which can demonstrate the experience or capacity to deliver legal assistance;

(ii) include in any such contract provisions to assure that any recipient of funds under division

(A) will be subject to specific restrictions and regulations promulgated under the Legal Services Corporation Act (other than restrictions and regulations governing eligibility for legal assistance under such Act and governing membership of local governing boards)

as determined appropriate by the Assistant Secretary; and

(iii) attempt to involve the private bar in legal assistance activities authorized under this title, including groups within the private bar furnishing services to older individuals on a pro bono and reduced fee basis.

(11)(B) The plan contains assurances that no legal assistance will be furnished unless the grantee administers a program designed to provide legal assistance to older individuals with social or economic need and has agreed, if the grantee is not a Legal Services Corporation project grantee, to coordinate its services with existing Legal Services Corporation projects in the planning and service area in order to concentrate the use of funds provided under this title on individuals with the greatest such need; and the area agency on aging makes a finding, after assessment, pursuant to standards for service promulgated by the Assistant Secretary, that any grantee selected is the entity best able to provide the particular services.

(11)(D) The plan contains assurances, to the extent practicable, that legal assistance furnished under the plan will be in addition to any legal assistance for older individuals being furnished with funds from sources other than this Act and that reasonable efforts will be made to maintain existing levels of legal assistance for older individuals;

(11)(E) The plan contains assurances that area agencies on aging will give priority to legal assistance related to income, health care, long-term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination.

(12) The plan shall provide, whenever the State desires to provide for a fiscal year for services for the prevention of abuse of older individuals, the plan contains assurances that any area agency on aging carrying out such services will conduct a program consistent with relevant State law and coordinated with existing State adult protective service activities for--

(A) public education to identify and prevent abuse of older individuals;

(B) receipt of reports of abuse of older individuals;

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

(D) referral of complaints to law enforcement or public protective service agencies where appropriate.

(13) The plan shall provide assurances that each State will assign personnel (one of whom shall be known as a legal assistance developer) to provide State leadership in developing legal assistance programs for older individuals throughout the State.

(15) The plan shall provide assurances that, if a substantial number of the older individuals residing in any planning and service area in the State are of limited English-speaking ability, then the State will require the area agency on aging for each such planning and service area—

(A) to utilize in the delivery of outreach services under section 306(a)(2)(A), the services of workers who are fluent in the language spoken by a predominant number of such older individuals who are of limited English-speaking ability; and

(B) to designate an individual employed by the area agency on aging, or available to such area agency on aging on a full-time basis, whose responsibilities will include-

(i) taking such action as may be appropriate to assure that counseling assistance is made available to such older individuals who are of limited English-speaking ability in order to assist such older individuals in participating in programs and receiving assistance under this Act; and

(ii) providing guidance to individuals engaged in the delivery of supportive services under the area plan involved to enable such individuals to be aware of cultural sensitivities and to take into account effectively linguistic and cultural differences.

(16) The plan shall provide assurances that the State agency will require outreach efforts that will— identify individuals eligible for assistance under this Act, with special emphasis on—

(i) older individuals residing in rural areas;

(ii) older individuals with greatest economic need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas;

(iii) older individuals with greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas;

(iv) older individuals with severe disabilities;

(v) older individuals with limited English-speaking ability; and

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

(A) inform the older individuals referred to in clauses (i) through (vi) of subparagraph (A), and the caretakers of such individuals, of the availability of such assistance.

(17) The plan shall provide, with respect to the needs of older individuals with severe disabilities, assurances that the State will coordinate planning, identification, assessment of needs, and service for older individuals with disabilities with particular attention to individuals with severe disabilities with the State agencies with primary responsibility for individuals with disabilities, including severe disabilities, to enhance services and develop collaborative programs, where appropriate, to meet the needs of older individuals with disabilities.

(18) The plan shall provide assurances that area agencies on aging will conduct efforts to facilitate the coordination of community-based, long-term care services, pursuant to section 306(a)(7), for older individuals who--

(A) reside at home and are at risk of institutionalization because of limitations on their ability to function independently;

(B) are patients in hospitals and are at risk of prolonged institutionalization; or

(C) are patients in long-term care facilities, but who can return to their homes if community-based services are provided to them.

(19) The plan shall include the assurances and description required by section 705(a).

(20) The plan shall provide assurances that special efforts will be made to provide technical assistance to minority providers of services.

(21) The plan shall--

(A) provide an assurance that the State agency will coordinate programs under this title and programs under title VI, if applicable; and

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

(22) If case management services are offered to provide access to supportive services, the plan shall provide that the State agency shall ensure compliance with the requirements specified in section 306(a)(8).

(23) The plan shall provide assurances that demonstrable efforts will be made--

(A) to coordinate services provided under this Act with other State services that benefit older individuals; and

(B) to provide multigenerational activities, such as opportunities for older individuals to serve as mentors or advisers in child care, youth day care, educational assistance, at-risk youth intervention, juvenile delinquency treatment, and family support programs.

(24) The plan shall provide assurances that the State will coordinate public services within the State to assist older individuals to obtain transportation services associated with access to services provided under this title, to services under title VI, to comprehensive counseling services, and to legal assistance.

(25) The plan shall include assurances that the State has in effect a mechanism to provide for quality in the provision of in-home services under this title.

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

(27) The plan shall provide assurances that area agencies on aging will provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care.

## Sec. 308, PLANNING, COORDINATION, EVALUATION, AND ADMINISTRATION OF STATE PLANS

(b)(3)(E) No application by a State under subparagraph (b)(3)(A) shall be approved unless it contains assurances that no amounts received by the State under this paragraph will be used to hire any individual to fill a job opening created by the action of the State in laying off or terminating the employment of any regular employee not supported under this Act in anticipation of filling the vacancy so created by hiring an employee to be supported through use of amounts received under this paragraph.

## Sec. 705, ADDITIONAL STATE PLAN REQUIREMENTS (as numbered in statute)

(1) The State plan shall provide an assurance that the State, in carrying out any chapter of this subtitle for which the State receives funding under this subtitle, will establish

programs in accordance with the requirements of the chapter and this chapter.

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

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

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

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

(6) The State plan shall provide an assurance that, with respect to programs for the prevention of elder abuse, neglect, and exploitation under chapter 3—

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

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

(ii) receipt of reports of elder abuse;

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

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

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

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

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

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

(iii) upon court order...



# Verification of Older Americans Act Assurances

By signing this document, the authorized officials commit the Area Agency on Aging (AAA) to performing all listed assurances and activities as stipulated in the Older Americans Act, as amended in 2016. In addition, the AAA provides assurance that it will adhere to all components of the South Carolina Aging Network's Policies and Procedures Manual, the South Carolina Department on Aging's (SCDOA) Multigrant Notification of Award Terms and Conditions, and to individual SCDOA programmatic policies and procedures.

\_\_\_\_\_

**Board of Directors Chairperson**

\_\_\_\_\_

**Date**

\_\_\_\_\_

**Planning Service Area Director**

\_\_\_\_\_

**Date**

\_\_\_\_\_

**Area Agency on Aging Director**

\_\_\_\_\_

**Date**

## C. Attachment C – Information Requirements

The Area Agency on Aging must provide all applicable information following each OAA citation listed below. The completed attachment must be included with your Area Plan submission. Please submit the AAA response under the appropriate sections below.

### Section 305(a)(2)(E)

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

#### Region's Response:

- 

### Section 306(a)(17)

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

*Full Regional Emergency Preparedness Plans are to be submitted to the SC Department on Aging on an annual basis by April 1<sup>st</sup>. These plans must include the four phases of disaster management – Mitigation; Preparedness; Response; and Recovery (Stabilization) for the planning and coordination of activities for the state and timely continuation of service and the restoration of normal living conditions for older individuals.*

#### Region's Response:

-

**Section 307(a)(10)**

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

**Region’s Response:**

- 

**Section 307(a)(14)**

The plan shall, with respect to the fiscal year preceding the fiscal year for which such plan is prepared—

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

**Region’s Response:**

-

## D. Attachment D - Programmatic Questions

The region's responses to these questions must be included within the attachment and submitted as part of the Area Plan.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

### Disability

In what ways do you plan on incorporating disability and accessibility into your existing programs?

### Transportation

What do you believe is the number one challenge facing your transportation program and what are some of your ideas to overcome this challenge?

### Assessment

Tell about your plans to increase productivity in your Assessment Program.

### Information and Referral/Assistance

Describe how your agency plans to address the external unmet needs identified in your monthly I&R data.

### Homecare

Tell about the homecare worker challenges your region is currently experiencing and tell your plans to address these challenges over the next 2 years.

**Insurance  
and  
Medicare  
Counseling**

In future years how to plan to ensure that all counties in your regions are served by both the SHIP and SMP Programs quarterly?

---

**Insurance  
and  
Medicare  
Counseling**

Should the funding for the SHIP/SMP/MIPPA programs be reduced or eliminated, how would you sustain the programs to ensure that Medicare beneficiaries in your region were continued to be served?

---

**Nutrition  
Programs  
and Services**

Describe how your agency plans to provide innovative or modernized nutrition program services to an increasingly diverse aging population.

---

**Nutrition  
Programs  
and Services**

Describe how your region plans to explore food insecurity and malnutrition data to understand community needs and available resources.

---

**Senior  
Centers**

Describe how your agency will partake in learning collaboratives, networking opportunities and broader communications to help centers address the needs, desires, and expectations of older adults.

---

**Health  
Promotion &  
Disease  
Prevention**

Describe how your agency plans to expand its reach with Evidence-Based Disease Prevention and Health Promotion programs.

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**Health  
Promotion &  
Disease  
Prevention**

Describe how your region plans to carry out integrated health and wellness activities to assist with modifying behaviors or improving health literacy.

---

**Family  
Caregiver  
Support  
Program**

Tell about how your region is working towards incorporating all areas (information and assistance to caregivers; counseling; support groups and caregiver training; respite; supplemental services) of the OAA programing for the Family Caregiver Support Program.

---

**Long Term  
Care  
Ombudsman  
Program**

How do you plan to increase the recruitment and retention of Volunteer Ombudsmen?

---

**Long Term  
Care  
Ombudsman  
Program**

How to you plan to increase program awareness to the community members and stakeholders?

---

**Legal  
Assistance  
Program**

What issues do you see that affect justice for seniors?

---

**Legal  
Assistance  
Program**

What hurdles, beyond funding, do you see that impede access to justice for seniors? Describe future collaborative efforts to address hurdles identified.

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## **E. Attachment E – Performance Measures Template**

For any performance measures identified that have quantifiable data, add the performance measure and data source to the document. Then begin to add the numbers and goals to the appropriate areas.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

*\*\*A link will be provided/where to find the chart.*



## F. Attachment F – Organizational Information

The following information will help provide information regarding the structure and Staff responsibilities of your agency.

a. Provide an organizational chart for the Area Agency on Aging

If the AAA is not freestanding, the chart must address placement of the aging unit within the multipurpose organization. The director of the multipurpose agency must certify that the aging unit functions only as the AAA for the purpose of carrying out the AAA functions specified in the Older Americans Act (OAA).

b. Provide the Area Agency on Aging Staff Responsibilities Chart

Complete the chart for all staff charging program time to any funding source on your SCDOA Notice of Grant Award (NGA).

- Employee's Name- enter the full name of the employee
- Employee's Title- enter the title as it appears on the employee's job description. The time should be entered as 1.0 equals a full time employee.
- Admin through SHIP/SMP- enter the average amount of time the employee works in each of the program areas identified. Please see the example in italics on the chart.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

*\*\* A link will be provided/where to find the chart.*

## **G. Attachment G – Regional Aging Advisory Council**

Under the Older Americans Act (**OAA 306(a)(6)(D) and 45 CFR 1321.57**) (each region is required to have a Regional Aging Advisory Council (RAAC). Describe your region's RAAC including the

- Composition (chart provided);
- Meeting frequency;
- How board members are selected, appointed, or elected;
- Terms of office;
- RAAC by-laws;
- Explanation of how RAAC minutes may be obtained by the general public.

Furthermore, explain how the RAAC advises the AAA on:

- Enhancing the leadership role of the AAA;
- Furthering the AAA's mission of developing and coordinating community-based systems of services for all older persons in the planning and service area;
- Matters relating to the development of the Area Plan;
- Administration of the Area Plan;
- Operations conducted under the Area Plan; and
- Conducting public hearings.

Additionally, an Advisory Committee is required to represent the needs of Family Caregivers. If your region does not have a separate Family Caregiver Advisory Council, explain how your region's RAAC meets the requirements of a Family Caregiver Advisory Council.

*\*The SCDOA has created a chart that is required in this section of the area plan.*

*\*\* A link will be provided/where to find the chart.*

## H. Attachment H – Mapping

For mapping, it is important to be consistent throughout the state by using the same source for key data elements and by presenting the maps in a consistent manner.

Each map shall be of the county and have the low-income seniors as an overlay. The data for low-income seniors shall be from the 5-year American Community Survey data from 2020 broken out to the census tract level. This data can be found at the Census Bureau (<https://data.census.gov/cedsci/table>) as report S1701 | Poverty Status in the Past 12 Months. The direct link is: <https://data.census.gov/cedsci/table?q=s1701&q=0400000US45%241400000>

In the S1701, column S1701\_C03\_009E is the Estimate of Percent below poverty level Population for whom poverty status is determined Age 60 and over. Each census tract should have a progressive shading:

- #E3F2FD – <5%
- #BBDEFB – < 15%
- #90CAF9 – < 25%
- #64B5F6 – <35%
- #42A5F5 – 35% and over

The client address should be black dots on the map.

It is excessive to provide an overlay for each of the key demographics. Instead, the remaining target populations shall be represented in a table. Each column is the percentage of the target based on the total population for the county.

The relevant Census Bureau reports are all 2020 5-year ACS surveys by county.

- S0101 – Age 60+ and 85+
- B16004 – Limited English 65+
  - The breakpoints for 60 falls within the 55-64 range, so 65+ is used
- B01001H – While Alone Non-Hispanic
  - The breakpoints for 60 falls within the 55-64 range, so 65+ is used
  - This is male and female by age (columns BD, BH, BL, DL, DP, and DT)
  - S0101 provides the total population 65+ (column DO)
  - The percent minority is the inverse of the 65+ White Alone Non-Hispanic divided by the total 65+
    - $1 - (B01001H \text{ data} / S0101 \text{ data})$

Rural uses the USDA Rural-Urban Commuting Area (RUCA) codes, with ACL defining which RUCA codes are considered rural. The 2010 RUCA Codes (revised 7/3/2019) can be found at: <https://www.ers.usda.gov/data-products/rural-urban-commuting-area-codes/>

ACL uses Categorization C from <http://depts.washington.edu/uwruca/ruca-uses.php> and breaks out the RUCA codes as follows:

Rural	RUCA code: 4.0, 4.2, 5.0, 5.2, 6.0, 6.1, 7.0, 7.2, 7.3, 7.4, 8.0, 8.2, 8.3, 8.4, 9.0, 9.1, 9.2, 10.0, 10.2, 10.3, 10.4, 10.5, and 10.6.
Non-Rural	RUCA code: 1.0, 1.1, 2.0, 2.1, 3.0, 4.1, 5.1, 7.1, 8.1, and 10.1.

County	% 60+	% 85+	% Minority	% Rural	% Limited English

**Required Charts:**

**1. Home Delivered Meals by Client Home location**

**2. Home Care Services by Client Home location**

- Legend required for:
  - Personal Care
  - Homemaker
  - Chore
  - Minor Home Repair

**3. Contracted Transportation by Client Home location**

**4. Assessments by Client Home location**

- Legend required for:
  - Receiving Services
  - Not Receiving Services
- This may be split into two maps after research

**5. Contracted Senior Centers by location**

- Legend required for:
  - **Multipurpose Senior Center (Focal point)** –  
A resource hub for activity, services, and programs for all active older adults in the community, with a specific focus on improving health and wellness, education, and socialization. Typically, these

are community buildings and structures that stand alone and are used primarily as a senior center and host facility for community activities.

- **Group Dining Site** –  
The primary purpose of operating as group dining site is to provide a nutritious meal, socialization, and nutrition education.
- **Intergenerational** –  
Intergenerational shared sites are a unique type of Intergenerational program that pairs younger generations with older adults in the same physical location, with periodic activities or programs that bring them together.
- **Congregate Meals Offered**

Use this Table with III-D Map Visual (Congregate Sites and III-D Programming)

Table Completion Instructions: In the “Evidenced-Based Program” column, provide the name of the program offered in the Fiscal Year. Include whether the program is offered at a site and/or virtually and in which county.

Evidenced-Based Program (Name)	Site Name(s) /Virtual	County Name
No III-D Programming was offered at the following site/county FY22	Site Name(s)	County Name

**6. Family Caregiver Respite Vouchers by Caregiver location**

- This map does not require the senior income overlay.

## I. Attachment I – Fiscal

### Match

The AAA will provide to SCDOA a written plan of how the required match funds for the OAA funds would be obtained and provided to the AAA should such time come that the state does not provide sufficient state dollars for SCDOA to provide 100% of the required match.

### Fiscal Monitoring

Describe how the AAA conducts quality assurance (fiscal monitoring) of the providers and the frequency of the reviews. The AAA should include how they review the provider's process for accounting for any donations or cost sharing of services. Provide details of how the AAA addresses issues of non-compliance as a result of monitoring providers.

### Competitive Procurement

Provide a chart showing the contracts, Memorandum of Understanding, and Memorandum of Agreement with all providers whether as a contractor or a sub-recipient. This should include the original execution date and the anticipated end date after all renewals.

Provider Name	Original Execution Date	End Date	Contractor/ Sub-recipient	Counties Served	Services Awarded

*\*The SCDOA has created a chart that is required in this section of the area plan.*

*\*\*A link will be provided/where to find the chart.*

### Allocation Methodology

Detail the process the AAA uses to allocate Federal, State, and other funding to providers and services.

### Budget Narrative

Explain the budget process and detail any significant changes expected.