



State of South Carolina
Department on Aging

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Director

PROGRAM INSTRUCTION FOR: AREA PLAN PROCESS

INFORMATION MEMORANDUM FOR: Area Agencies on Aging

SUBJECT: PROGRAM INSTRUCTION (PI) for AREA PLAN PROCESS

DATE: August 10, 2026

AAA COMPLIANCE DATE: July 1, 2027

AREA PLAN PROCESS	POLICY NUMBER
REFERENCE(S): 1321.65	
RELEASE DATE: July 1, 2026	AAA COMPLIANCE DATE: July 1, 2027

Policy Statement

According to OAA Section 306(a), each AAA shall prepare and develop its Area Plan for the multi-year period determined by the South Carolina Department on Aging (SCDOA), typically 2-4 years. The Area Plan submitted by the AAA to SCDOA for review and approval shall be in the uniform format developed and outlined by the SCDOA in the Area Plan Instructions.

An Area Plan is the document submitted by the AAA to SCDOA to define how the AAA will apply the Older Americans Act (OAA) and state grants for services in the comprehensive and coordinated service delivery system within the planning and service area. Through the Area Plan, the AAAs commit to administering funded activities in accordance with all OAA and SCDOA requirements. The Area Plan describes the AAA's efforts for continual development and maintenance of a

comprehensive and coordinated service delivery system for older adults, adults with disabilities, and family caregivers.

The area plan shall be prepared in accordance with content, duration, and formatting requirements as required by SCDOA.

South Carolina AAA area plans shall include:

1. Identification within each planning and service area of the populations in greatest economic need and greatest social need, as defined by SCDOA.
2. Assessment and evaluation of unmet need for supportive services, nutrition services, evidence-based disease prevention and health promotion services, family caregiver support services, and multipurpose senior centers, using objectively collected and statistically valid data. The evaluations shall consider all services in these categories regardless of the source of funding for the service.
3. Evidence of public participation in the development of the plan, including:
 - a. How each AAA seeks the periodic views of older individuals, family caregivers, service providers and the public, with a focus on those in greatest economic need and greatest social need;
 - b. A minimum 30 calendar day period during which the area plan is available for public review and comment.
 - c. That area plans are accessible in a public location and available in print by request.
4. The services, including a definition of each type of service; the number of individuals to be served; the type and number of units to be provided; and corresponding expenditures proposed to be provided with OAA and other funds.
5. Plans for how direct service funds will be distributed in order to address populations identified in greatest economic need and greatest social need, as identified by SCDOA;
6. Requests for waivers to provide direct services;
7. Minimum adequate proportion requirements as identified in SCDOA's approved State Plan;

Area plans shall incorporate services which address the incidence of hunger, food insecurity and malnutrition; social isolation; and physical and mental health conditions.

Area plans shall provide, to the extent feasible, for OAA services to be provided through self-direction.

Area plans shall develop objectives that coordinate with and reflect State Plan goals for services under the OAA.

The Area Plan will be updated annually for the duration of the plan. The due date and the format required will be included in the Area Plan Update instructions provided by the SCDOA.

Failure to comply with the Area Plan requirements listed in this policy, other associated policies or instructions, and the Department on Aging Area Plan guidelines will result in a delay or rejection of the Area Plan. Funding, as well as other support, may not be provided until all components of the Area Plan are received and approved by the Department on Aging.

Any Area Plan or amendment not in substantial conformity with the OAA, federal regulations, and the Department on Aging policy shall be rejected. When the Department on Aging disapproves an Area Plan, the AAA shall be notified in writing and informed of the opportunity for their plan to be resubmitted with necessary changes or updates. If, after providing the AAA proper opportunity for required changes, the Department on Aging still finds the Area Plan unacceptable, it shall reject the plan and may:

- implement a formal Corrective Action Plan;
- withhold further payments to the AAA;
- terminate funds, with written notification by the Department on Aging to the Administration for Community Living (ACL);
- provide a plan for the continuity of services in the affected planning and service area;
- designate a new AAA in a timely manner;
- perform the responsibilities of the AAA, if necessary; or
- assign AAA responsibilities to another agency in the planning and service area.

An AAA shall amend the plan if:

- a new or amended state or federal statute or regulation requires a new provision, or conflicts with any existing plan provision;
- a Program Instruction (PI) is distributed from the Department on Aging that significantly impacts a region's area plan;
- the AAA proposes to change the designation of the single organizational unit or component unit;
- the AAA proposes to add, substantially modify, or delete any objective(s);
- the AAA or its providers are unable to meet targeted populations and goals;
- The SCDOA requires further annual amendments; or
- The AAA proposes to change or add providers funded under the Area Plan.

SUA Procedure

SCDOA shall provide the AAAs with Area Plan instructions, outlining required content, format, and timeline for submission.

Upon receipt of Area Plan submissions, each Area Plan is reviewed by a committee within SCDOA consisting of fiscal and program staff. Staff use the written instructions provided to the AAA as a basis for the review. Following the SCDOA staff committee's feedback, the SCDOA Policy Analyst will notify the AAA in writing of the Area Plan's acceptance or any corrective actions needed.

The Department on Aging will approve an Area Plan or amendment when the plan meets all of the requirements in this policy, other associated policies, or as otherwise prescribed by the Department on Aging.

The Department on Aging may approve an Area Plan or amendment with conditions when necessary. The conditions of approval will be in writing. All conditions placed on an approved Area Plan will be consistent with the authority delegated to the Department on Aging by the OAA and the State of South Carolina. When an Area Plan is approved with conditions, the AAA and its providers shall meet these conditions within the specified time frame provided by the Department on Aging. No grant agreement shall be finalized between the Department on Aging and the AAA until all conditions are satisfied (**OAA 306(a)(1) to (15)**).

The SCDOA will use a region's Area Plan as a tool when monitoring and providing technical assistance to an Area Agency on Aging.

AAA Procedure

The AAA will develop and submit its Area Plan, along with required signatures, based on the instructions and guidance provided by SCDOA.

The AAA will conduct a community assessment, engage in community events, seek stakeholder input, as well as identify and use objectively collected and statistically valid data to identify:

- Vulnerable populations, including those who are in greatest economic and social need;
- Presenting needs and unmet needs of older adults, adults with disabilities, and family caregivers with a particular focus on services outlined in the Policy Statement; and
- The need for services to address:
 - Hunger, food insecurity, and malnutrition;
 - Social isolation; and

Physical and mental health conditions. The AAA shall include in the Area Plan an assessment of how prepared the AAA and the service delivery network in the planning and service area are for any anticipated change in the number of older individuals during the 10-year period following the fiscal year for which the plan is submitted. Such assessment may include:

- the projected change in the number of older individuals in the planning and service area;
- an analysis of how such change may affect the populations targeted in the Act;
- an analysis of how programs, policies, and services provided by the AAA can be improved, and how resource levels can be adjusted to meet the needs of the changing population of older individuals in the planning and service area;
- an analysis of how the change in the number of individuals age 85 and older in the planning and service area is expected to affect the need for supportive services.)

The AAA must seek public participation for the development of its area plan. This process must include insight and/or feedback from:

- Older adults, family caregivers, service providers, and the public, with a focus on those in greatest economic and social need; and
- The Regional Aging Advisory Council (RAAC).

A complete copy of the Area Plan (including the methodology for how funds are distributed across the region) must be made available by the AAA to the public for review and comment for a minimum of 30 calendar days. The plan must be available in a public location and available in print by request.

The AAA must host a minimum of 3 in-person public participation events geographically dispersed throughout its planning and service area as an opportunity for the public to provide comments on its area plan. Virtual opportunities are also encouraged but cannot replace an in-person requirement. In-person public participation events may include, but are not limited to:

- Formal public hearings or forums
- Co-hosting a public hearing with another governmental entity
- Incorporating opportunities for the public to provide input on the Area Plan at a community or outreach event

The Area Plan, along with the opportunities to provide public comment through hearings and other avenues, shall be widely advertised using multiple communication methods, including but not limited to websites, newspapers, social media, and newsletters.

The AAA shall ensure that all public participation events are accessible and shall provide reasonable accommodations upon request. The AAA shall also provide language assistance, including translation of the Area Plan, upon request to ensure meaningful access to participation and review.

The AAA must provide evidence of public participation. At a minimum, a summary of events (hearings, forums, and/or events) held, the number of participants, and a record of comments will be required as part of the Area Plan.

See also: (related/cross-referenced policies – use hyperlinks)

Greatest Social and Economic Need



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