

# Area Plan Development Processes

Strategies and processes to develop a comprehensive and coordinated plan

**November 20, 2019**



# Today's panel

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Disability, Aging and Veteran Services

Washington County Department of Health and Human Services

## Paula Hall

Chief Executive Officer

CAPECO

## Ruth McEwen

Chair, Senior Advisory Council

NWSDS

## Deb McCuin

Program Analyst

Community Services & Supports Unit



# What we will cover today

- A little background on AAAs, Area Plans and Older Americans Act (OAA) requirements
- Some fundamental processes for Area Plan Development
- AAA experiences in Area Plan development
- The role of the Senior Advisory Council in Area Plans and development

# AAA Mission

The OAA states it is the mission of the Area Agency on Aging to:

- Be the leader relative to all aging issues in its area,
- Proactively carry out a wide range of functions -  
**designed to lead to the development or enhancement of  
comprehensive and coordinated community based systems**
- ... to assist older persons in leading independent, meaningful and dignified lives in their own homes and communities as long as possible.

(From 42 CFR § 1321.53)

# AAA Responsibilities

An AAA has three overarching responsibilities under the OAA:

- 1) **Advocate** for all older Americans within its planning and service area (PSA);
- 2) Identify the needs of older adults in its PSA and **create a multi-year plan known as the Area Plan on Aging**, for the development of comprehensive and coordinated community based long-term services that meet the identified needs;
- 3) **Administer OAA funds and other funds available to implement the Area Plan on Aging**. The AAA is to administer funds largely through contracts with local service providers that furnish these services at the community level.



# Area Plans on Aging

Older Americans Act Section 306 (a):

- AAAs must develop an Area Plan for their Planning and Service Area (PSA) in order to be approved by the State agency.
- In Oregon, Area Plans are for a four-year period, with annual updates.
- Plans are developed based on a uniform format – known as the “Area Plan Instructions.”



# What's the timing?

Area Plans are for a four-year period

- Current Plans are for January 2017 – December 2020
- The next Plan period is **January 2021 – December 2024**

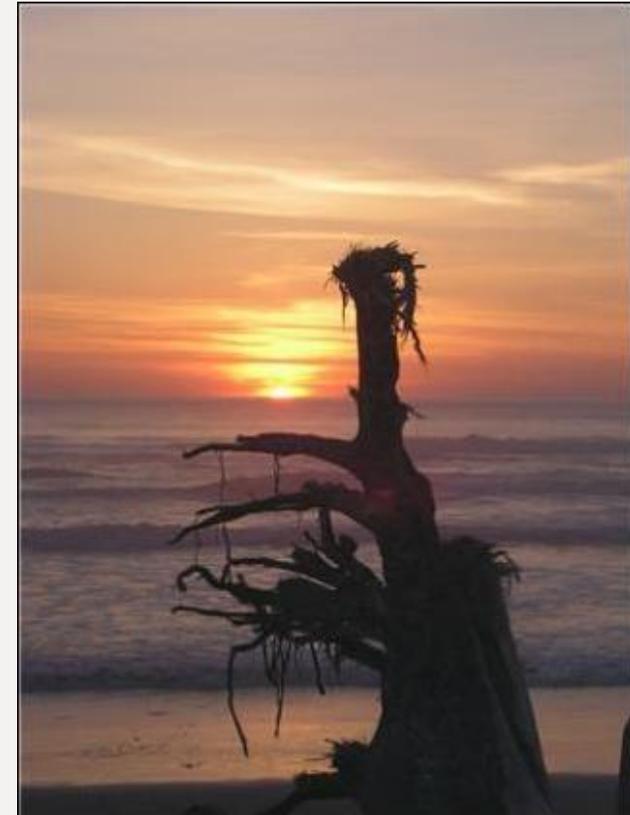
August, 2019 - Area Plan Instructions were released to AAAs

**September, 2020** – Area Plans from AAAs are due to DHS



# Some commonly used processes

- Conduct a scan for other local/regional assessments
- Conduct a needs assessment
- Synthesize and prioritize the information collected
- Develop recommendations for service priorities
- Take recommendations to the community for feedback
- Conduct public hearings and receive comments and feedback
- Incorporate public feedback into final Plan
- Senior Advisory Council reviews and approves recommendations to the AAA governing board
- Governing board has final review and approval authority
- AAA completes Plan and submits to DHS/APD
- DHS/APD reviews for final approval



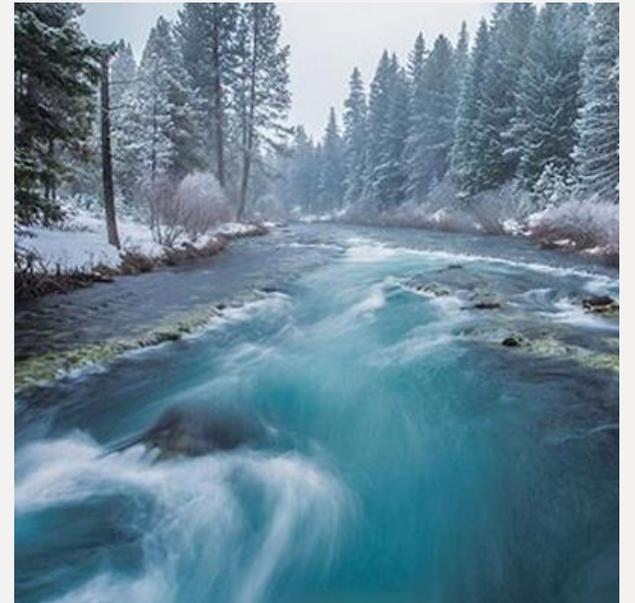
# Additional Resources

## [“Tools for Planning”](#)

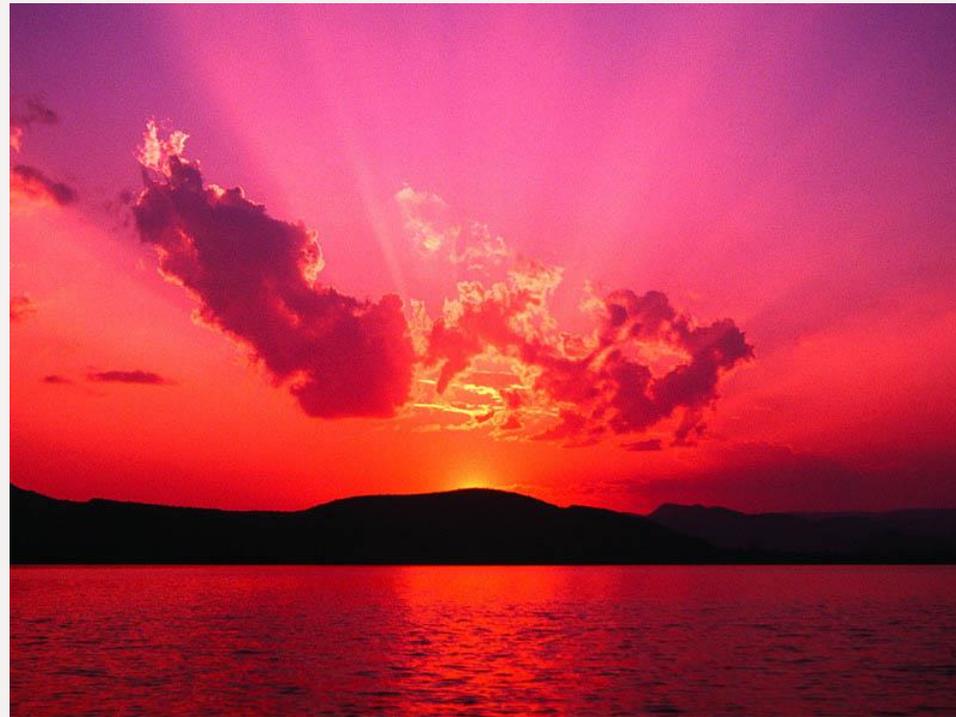
From ADvancing States, formerly the National Association of States United for Aging and Disabilities (NASUAD).

This resource is to assist States in developing State Plans on Aging but has a section on Planning that may also offer some good ideas for AAAs.

[Area Plans section](#) of Community Services and Supports website



# Questions, Thoughts, Feedback





**Rebecca Miller – Washington County DAVS**

# Needs Assessment – Focus Groups

Data	Use population and service level data to determine priority populations
Safety	Consider what people need to feel safe and comfortable (it will vary).
Advise	Go to an advisory body to talk about what you hope to accomplish, share a draft of the focus group questions, and ask for input to make it better.
Snowballs	Ask the advisory body or stakeholder organizations who else you should talk to. Walk about example.
Let Go	Work with trusted organizations and community leaders to convene. <ul style="list-style-type: none"><li>• Relationship that lasts beyond AAA need.</li><li>• Flexible style.</li></ul>

# Needs Assessment

Why	Be clear about how the information will be used and consider what's "in it" for participants.
Value	Provide compensation whenever possible.
Check	Plan to circle back with folks and tell them what they told you to ensure you got it right.
Context	Lead with context for the project. Why now? Why them?
Build	Share what you've learned from previous sessions and build from there.



# Sharing Power

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- Stakeholders involved each step
- Valuing lived experience and relationships
  - Agreements with CBO
  - T/A for lay leaders
  - Stipend for participants
  - Food, raffle, giveaways
- Only ask what you intend to use
- Flexible process
- Use language and terms used by participants
- Developing goals and objectives together
- Are you willing to restructure or offer new widgets? Be transparent.

# Questions, Thoughts, Feedback

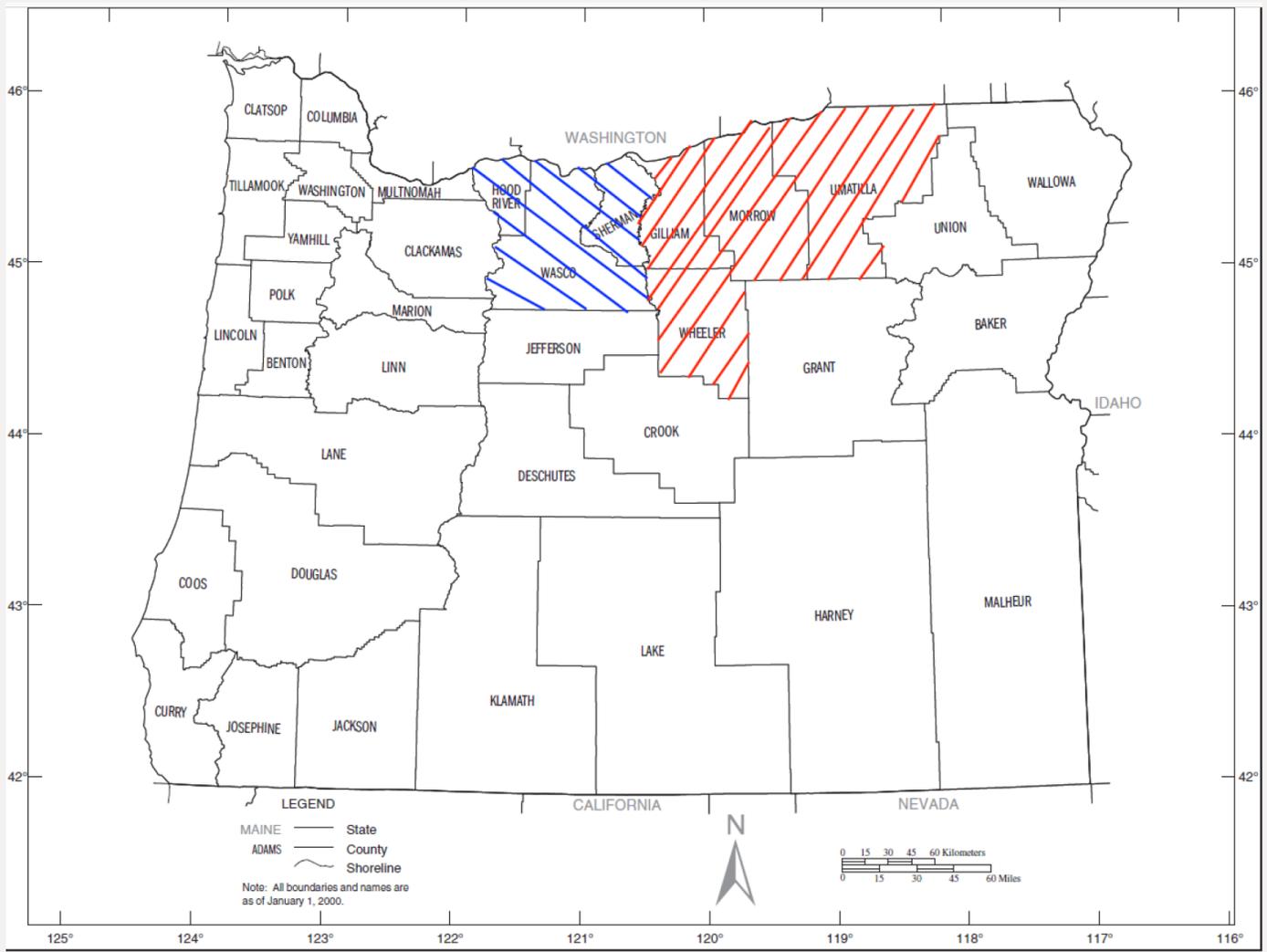


# Paula Hall

Chief Executive Officer  
Community Action Program of East Central Oregon  
(CAPECO)

Serving Umatilla, Morrow, Gilliam, Wheeler, Sherman,  
Wasco, and Hood River counties

# CAPECO'S SERVICE AREA



# PLANNING PROCESS

OCTOBER 12, 2017

NEWS RELEASE FROM DHS REGARDING THEIR INTENT TO DESIGNATE A NEW AAA FOR THE FIVE-COUNTY PLANNING AND SERVICE AREA SERVED BY MID-COLUMBIA COUNCIL OF GOVERNMENTS (MCCOG)

OCTOBER 26, 2017

PUBLIC MEETING IN HOOD RIVER

OCTOBER 31, 2017

PUBLIC MEETING IN THE DALLES

NOVEMBER 1, 2017

PUBLIC MEETING IN FOSSIL

NOVEMBER 2, 2017

PUBLIC MEETING IN CONDON

# PLANNING PROCESS CONT.

NOVEMBER 17, 2017

LETTER ISSUED FROM DHS THAT NO UNIT OF GENERAL PURPOSE LOCAL GOVERNMENT HAD EXPRESSED INTEREST IN BECOMING A AAA. LEAVING THE OPTION TO APPLY FOR THE AAA DESIGNATED AREA TO ALL CONTIGUOUS AAA'S – CAPECO BEING ONE

DECEMBER 1, 2017

CAPECO BOARD APPROVED THE APPLICATION FOR THE AAA DESIGNATION

FEBRUARY 15, 2018

ENGAGED WITH EASTERN OREGON BUSINESS SOURCE (EOBS) TO CONDUCT AN AGENCY-WIDE COMPREHENSIVE NEEDS ASSESSMENT

JUNE 12, 2018

SIGNED CONTRACT FOR EOBS TO CONDUCT ASSESSMENT

# PLANNING PROCESS CONT

## TYPES OF ASSESSMENTS CONDUCTED

- WRITTEN (PAPER)
- ON-LINE (WEBSITE)
- FACEBOOK
- LISTENING SESSIONS

**PROVIDED IN BOTH ENGLISH AND SPANISH**

TARGET POPULATION: CONSUMER/CLIENT, SERVICE PROVIDERS,  
PARTNERS AND PUBLIC/GOVERNMENT ENTITIES

# PLANNING PROCESS CONT.

Date	Service Area	Time	Possible Locations/Regular Happenings	Key Contacts/Partners to Engage	Methods to Publicize
Aug 28 Confirmed with Susan COMPLETED _____ Aug 27 Confirmed with Barbara/ Bernadine COMPLETED	Pendleton* _____ Pendleton	1-3 pm _____ 11-1 pm	City Hall Community Room 500 SW Dorion Pendleton, OR 97801 _____ Senior Center 510 SW 10th Pendleton, OR 97801	Confirmed with Susan on 7/11/2018, City Hall on 8/27/18 _____ Confirmed with Barbara/Bernadine on 7/11/2018. Call two days ahead to remind them and they will announce the day before. Vivian will introduce and give us time to talk. Confirmed with Ema Jean on 8/27/2018. Arrive at 11:15 AM.	Chamber, EO, KUMA, library, city webpage
September 18 Confirmed with Gina	Hermiston*	3pm-5pm	Community Center 415 S Hwy 395 Hermiston, OR	Confirmed with Gina on 7/11/2018, Diana Picard will call with details, caterers, cost 541-667-5018	Chamber, KOHU, EO, City webpage
July 19 confirmed with Sabrina COMPLETED	Condon	11:30 am	Condon Senior Center	Per CAPECO Teddy Fennern, Sr Advisory Counsel <a href="mailto:Teddy.fennern@co.gilliam.or.us">Teddy.fennern@co.gilliam.or.us</a> Sabrina Wagennar, Sr Advisory Counsel and Cook <a href="mailto:Sabrina.wagenaar@co.gilliam.or.us">Sabrina.wagenaar@co.gilliam.or.us</a>	
September 12 confirmed with Sharion Asher 8/8/2018 confirmed with Sherion Asher on 9/11/2018	Fossil	luncheon publicized as 12	Fossil Senior Center 714 Main St. Fossil, OR 97830	Per CAPECO Sherion Asher, Sr Advisory Counsel <a href="mailto:roldfossil@aol.com">roldfossil@aol.com</a>	

7/30/2018

- \*\*\$25 gift card to local grocery or gas station (2 per session, total of 8 for \$200)
- \*\* Book from EOBS
- Susan to arrange for and publicize these meetings. Both Nick and Susan to attend and co-facilitate. Nick to compose surveys and research.
- EO, flyers for CAPECO to distribute, flyers to post in public/no cost places nearby, send flyers to venues ahead of confirmed date

# PLANNING PROCESS CONT.

OCTOBER 15 & 17, 2018

## ***PLANNING MEETING WITH AREA PLAN WORK GROUP***

PURPOSE: SET GOALS & OBJECTIVES PER FOCUS AREA (9 IN TOTAL)

OUTCOME: DEVELOPED A PROBLEM/NEED STATEMENT

ADDRESSED: PLANS TO MEET THE NEED

IDENTIFIED: PARTNERSHIPS – NEW & EXISTING  
STAFFING NEEDS OR CONTRACT FOR SERVICES  
POTENTIAL CHALLENGES

NOVEMBER 19, 2018

PUBLIC HEARING FOR PLAN

# RESULT

## CAPECO AREA PLAN

For the period of  
October 1, 2018 – December 31, 2020

*Serving Gilliam, Hood River, Morrow, Sherman,  
Umatilla, Wasco, and Wheeler Counties*

CAPECO Administrative Office  
721 SE Third Street, Suite D  
Pendleton, OR 97801



*“ASSISTING PEOPLE TO BECOME  
INDEPENDENT, HEALTHY AND SAFE”*



# LESSONS LEARNED?

- BETTER COORDINATION WITH THE SPANISH-SPEAKING COMMUNITY
- BETTER COORDINATION WITH THE NATIVE AMERICAN COMMUNITY
- BETTER UNDERSTANDING OF CULTURAL SENSITIVITIES

**MAKE FRIENDS, BE PATIENT, ACTIVELY LISTEN**

# Questions, Thoughts, Feedback



# Ruth McEwen

Chair, Senior Advisory Council  
NorthWest Senior and Disability Services (NWSDS)

Home Care Commission  
Governor's Commission on Senior Services

# Mandate of the Senior Advisory Council

## The OAA states that a AAA must:

- Establish an Advisory Council
- “to advise continuously the area agency on aging on all matters relating to the development of the area plan, the administration of the plan and operations conducted under the plan.”



# Roles for Advisory Councils

- Participate on the work group that oversees development of the area plan and budget
- Review and provide input on materials as they are developed in the area plan process
- Participate in key activities related to conducting a community needs assessment, such as:
  - helping to develop and distribute surveys;
  - participating in focus groups and listening sessions;
  - helping to conduct targeted interviews with consumers and program participants,
  - involvement in the review and synthesis of survey results, etc.

# Roles for Advisory Councils

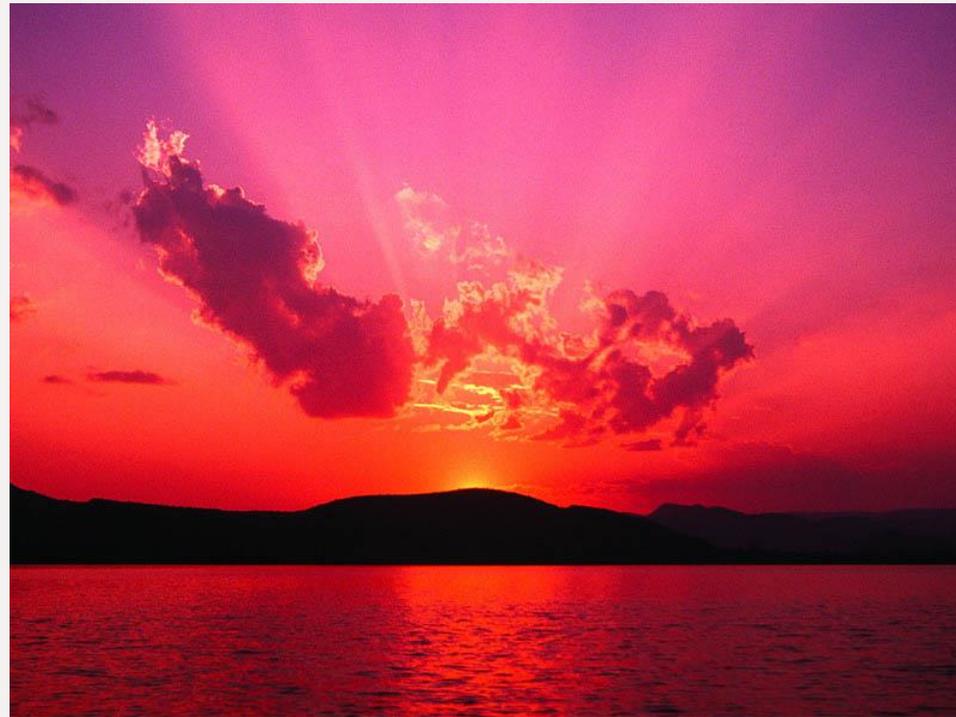
- Review and provide input on these key areas of the area plan:
  - service needs and priorities
  - process for how priorities are established
  - development of an area plan budget reflective of the priorities
  - goals and activities developed for the coming 4 years
  - participate in community hearings on the area plan and consider how feedback will be incorporated into the final plan
  - service equity

# Roles for Advisory Councils

- Review and approve the final draft of the area plan and budget before its transmittal to DHS
- Educate the public about the area plan and share importance of public involvement
- Review and provide input on annual area plan updates



# Questions, Thoughts, Feedback



## We will help you

CSSU liaisons are available to AAAs for technical and other assistance

APD District Managers can also assist in some areas



# Contact Information

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NWSDS

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