

Performance Results

State Fiscal Year

2023

Prepared by the
Iowa Department on Aging

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510 E 12th St., Ste. 2
Des Moines, IA 50319



C 515.725.3333
T 800.532.3213



iowaaging.gov

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Executive Summary

Reviewing fiscal year 2023 performance results helps the Iowa Department on Aging (IDA) improve decision-making and accountability to the citizens of Iowa. We are pleased to present IDA's State Fiscal Year (SFY) 2023 (July 1, 2022 - June 30, 2023) Performance Results Report. The report contains information about the services IDA and its partners provided to older Iowans. The focus is on results and aligns with the requirements of Iowa's Accountable Government Act, which requires Iowa state government to adopt strategic planning, agency performance planning, performance measurement and reporting, and performance audits. The report highlights major accomplishments, provides an overview of consumers served, compares IDA's performance results to projected performance targets, and describes challenges.

Key Accomplishments

In SFY 2023, IDA completed effective and consistent statewide service delivery in the following areas.

- The Iowa Department on Aging partnered with the National Center for Advancing Person Centered Practices and Systems (NCAPPS) on a technical assistance project for improving person-centered practices across the state.
- Provided opportunities for partnerships across the ADRC through the No Wrong Door Stakeholder group, Public Health Workforce Rural Options Counseling Project, and LifeLong Links work group, Secret Shopper Information & Assistance Project, among other projects;
- SFY2023 nutrition consumers increased eight percent statewide compared to SFY2022, from 27,368 to 29,467 consumers. Congregate nutrition participation increased by twenty (20) percent and congregate meals served increased by twenty-seven (27) percent compared to SFY2202;
- The Office of Public Guardian worked with HHS, the Iowa developmental disabilities council, and other agencies to develop a referral system for the provision of guardianship and conservatorship services;
- IDA collaborated with the Public Health Division, AAAs and other Iowa agencies through significant workgroups to strengthen the partnerships that increase awareness and progress towards better supporting Iowans with Alzheimer's Disease and related dementias and their caregivers;
- IDA with an AAA to develop a resource tool for Iowa caregivers that is now part of the annual Iowa Caregivers Conference participant booklet. This tool ensures caregivers know the resources available in Iowa to aid in helping them maintain their role and well-being.

Linda Miller, Director - Iowa Department on Aging

Mission Statement

Plan for current and future needs of individuals as they age.

Vision Statement

This includes policy development and coordination to access integrated, high quality programs and services that support health, independence, and resiliency.

Core Functions

The roles and responsibilities of the Iowa Department on Aging are legislatively mandated within the Older Americans Act of 1965 Sec. 306(a)(4)(C). Below are our core duties as outlined in the Older Americans Act.

Advocacy

Advocate for changes in public policy, practices and programs that empower older Iowans, facilitate their access to services, protect their rights and prevent abuse, neglect, and exploitation. Activities may include legislative advocacy, information dissemination, outreach and referral, research and analysis and coalition building.

Health and Support Services

Support policies, programs, and wellness initiatives that empower older Iowans to stay active and healthy, and that improve their access to affordable, high quality long-term living and community supports.

Planning, Development and Coordination

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

Agency Overview

Agency Structure and Services

The Iowa Department on Aging is a department within the executive branch of Iowa state government, established by Iowa Code Chapter 231, and it is the designated State Unit on Aging (SUA) under the Federal Act. The Federal Act, administered by the U. S. Administration for Community Living (ACL) under the governance of the U. S. Department of Health and Human Services, outlines specific requirements for states to establish planning and service areas (PSAs) as well as Area Agencies on Aging (AAAs) to carry out

the Federal Act requirements. The SUA is then required to ensure compliance with federal statute and regulations as well as any state or administrative code. Under both the Federal Act and the Elder Iowans Act, IDA has the responsibility to serve as an effective and visible advocate for older individuals, their caregivers, veterans and adults living with disabilities. This charge is accomplished by reviewing and commenting upon state plans, area plans, budgets, and policies that affect older individuals, and by providing technical assistance to any agency, organization, association, or individual representing the needs of older individuals. IDA develops, submits and administers a State Plan on Aging under the Federal Act in cooperation with ACL. Under federal law, IDA is responsible for the planning, policy development, administration, coordination, priority setting, and evaluation of all state activities related to the objectives of these acts along with administering dozens of other associated activities.

IDA works to ensure that a comprehensive, coordinated and cost-effective system of long-term living and community support services is provided to consumers; older Iowans, veterans, adults living with disabilities and caregivers of those populations. IDA had seven citizens and four legislative Commissioners for SFY 2023 and 31 full time employees (FTEs). Twelve employees are charged with carrying out the duties of the Office of the State Long-Term Care Ombudsman (OSLTCO) whose role is to ensure the rights of long-term care facility and assisted living program residents and tenants. Seven Local Long-Term Care Ombudsman were housed in counties in their districts; remaining staff members worked remotely while administration was housed in the Des Moines, Iowa office located at the Jessie Parker Building, 510 East 12th Street, Suite 2, Des Moines, Iowa 50319.

Partners who assist in achieving IDA's vision and mission include Iowa Commission on Aging, Area Agencies on Aging (AAAs), and a variety of other public and private sector organizations. IDA collaborates extensively with Health and Human Services, Inspections and Appeals and other state agencies on many long-term care policies and program issues. IDA also partners with Iowa Vocational Rehabilitation Services, Iowa Workforce Development and the Iowa Department of Transportation. These partnerships are the cornerstone for enhancing a comprehensive and coordinated delivery system for consumers. Components of this long-term care system include creating a safe environment, making services accessible and providing alternatives and balance between institutional and non-institutional services.

IDA exists to advocate for and respond to the needs of an aging society by planning, promoting and coordinating a continuum of accessible and affordable services and choices. IDA provides leadership to both empower and enhance the lives of the populations we serve through choices, services, protection and respect. As Iowa's aging population continues to increase and experience generational change, IDA must be

cognizant, informative and agile to prepare for the effects on families and communities.

Population Served

The estimated number of Iowans aged 60 and over is 749,852 or 23.6 percent of Iowa’s total population.¹ By 2050 estimates show that in 85 counties, residents aged 65 or older will represent at least twenty percent or more of the respective population, compared to 30 counties in 2000.²

Table 1: Older Iowans Served Compared to All Older Iowans (Selected Characteristics)

Demographic Characteristic	All Older Iowans	Iowans aged 60+ served by the Aging Network (SFY 2023) ***
Lives Alone	42.6% ¹ (est. 319,437)	49% (approx. 22,000)
Rural Area	45.0% ⁴ (est. 337,549)	58% (approx. 27,000)
Poverty Rate	7.5% ¹ (est. 55,907)	26% (approx. 12,000)
Minority Status	5.4% ⁵ (est. 40,759)	5.1% (2,133) *

*Only counts persons who shared their minority status.

**Consumers recorded in a consumer group are excluded from totals

Iowa’s six (6) Area Agencies on Aging (AAAs) reported the services provided to Iowans 60+ are funded by the federal Older Americans Act through the Administration for Community Living (ACL) and by state general fund dollars. Population groups targeted for services included older Iowans living in rural communities, low-income and minority individuals, individuals with limited English.

¹ U.S. Census Bureau, American Community Survey 5-Year Estimates (2017 – 2021). Accessed 10/2023.

² Older Iowans: 2023. State Data Center of Iowa. May 2023. Accessed 10/2023.

³ Iowa Department on Aging – WellSky Aging & Disability (formerly SAMS) Case Management database. Extracts accessed on 11/2022.

⁴ U.S. Census Bureau, 2020 Census Decennial Survey. Accessed 10/2023.

⁵ AGID Tabulation of 2021 American Community Survey 1-year Estimates. Accessed 10/2023.

The SFY 2023 data includes the number of older lowans served and the number of service units provided. Over 37,000 lowans received more than 684,500 units of home and community-based services, over 4 million meals, over 121,705 health promotion or elder rights service units, and/or 88,000 caregiver service units. A more detailed look at the consumer profile revealed that 77% percent were aged 60 or older and that 15% percent reported a functional impairment related to an instrumental activity of daily living, such as shopping, doing chores, or using transportation. Caregiver consumer data showed 4,757 caregivers were served with over 129,400 units of service, with 68 percent of caregivers aged 60 years or older.⁴

Services, Programs and Activities

IDA maintained statutory and contractual relationships with the network of six (6) Area Agencies on Aging (AAA) which provide services to older lowans in each relative Planning Service Areas (PSAs) across the state. The AAAs and their contracted service providers, delivered nutrition, access, home and community-based services and caregiver services designed to support individuals in their homes and communities. The types of services, programs and activities managed by IDA included:

- Information and assistance on home and community-based services for independent living;
- Home and community-based services, such as chore, homemaker, and case management;
- Nutrition programs and services;
- Counseling, education, and respite care for caregivers of older adults and grandparents-older relatives caring for grandchildren or adult children with disabilities;
- Elder Abuse Prevention and Awareness program activities;
- Older worker training and employment activities;
- Long-Term Care Ombudsman services on behalf of residents and tenants of licensed and certified long-term care facilities;
- Education, training and public awareness regarding older adult issues including enhanced access to public benefits;
- Development of grants and grant management; and
- Service monitoring, accountability, and assessment activities.

⁴ Iowa Department on Aging-SFY 2023 Year End Data accessed on 11/30/2023.

Agency Performance Results

Core Function: Advocacy

Description: Advocate for changes in public policy, practices and programs that empower older lowans, facilitate their access to services, protect their rights and prevent abuse, neglect, and exploitation. Activities may include legislative advocacy, information dissemination, outreach and referral, research and analysis and coalition building.

Service: Aging & Disability Resource Center (ADRC) Information, Referral & Assistance

Description: The majority of lowans age 60 and older have a strong desire to live safely and independently in their own homes and communities. In order to remain in the setting of their choice, older lowans need information about and access to affordable long-term living and community services and supports that help them age in place. Iowa's Aging and Disability Resource Center (ADRC) system is a highly visible and trusted network where consumers and caregivers can obtain information on the full menu of long-term living and community support services. All lowans seeking information and assistance with the home and community-based supports and services that are needed to remain independent, can connect with AAAs online through an interactive web portal, by phone through a toll-free call system, and in-person through local coordination centers based at the AAAs. *(Links to Strategic Plan Goal 1: The Iowa Aging Network will support older lowans, lowans with disabilities, and caregivers as they make informed decisions and exercise self-determination and control about their independence, wellbeing, and health.)*

Why we are doing this: A strong no-wrong door system empowers lowans to make informed choices, streamline access to supports and services, minimize consumer confusion, and enhance individual choice. Iowa's ADRC enables policy makers and program administrators to effectively respond to individual needs, address system problems, and limit the unnecessary use of high-cost services. This network serves as a primary source of information about the Older Americans Act (OAA) core programs and other services for older lowans and caregivers.

What we're doing to achieve results: Department staff pursue the following ADRC activities by:

- Working with local and regional partners to ensure comprehensiveness and sustainability of the ADRC network;
- Developing partnerships with healthcare networks and organizations working with veterans, persons with behavioral health, intellectual and physical disabilities, and persons who are dual eligible;
- Providing technical assistance and training to support the ADRC;

- Utilizing a standard evaluation process to assess effectiveness and to identify efficiencies with the ADRC;
- Developing a monitoring schedule to review the ADRC for compliance.

Results

Performance Outcome	Performance Outcome Measures	FY 2023 Target	FY 2023 Actual	Link to Strategic Plan
Iowans will receive accurate information and guidance in a manner that allows them to make informed choices about long-term supports and how to obtain them.	Percentage of ADRC (Lifelong Links) callers indicating they received the information they were seeking. (297_04500_005)	99.9%	99.9%	Goal 1: The Iowa Aging Network will support older Iowans, Iowans with disabilities, and caregivers as they make informed decisions and exercise self-determination and control about their independence, wellbeing, and health.
	Percentage of Options Counseling consumers who indicate they were provided information to make an informed decision on goal and service needs (297_04500_006)	94%	94%	

Service	Service Measure	FY 2023 Target	FY 2023 Actual	Strategies/Recommended Actions
ADRC Information & Access	Number of Iowans receiving information & assistance or access assistance service. (297_04500_003)	14,546	19,340	<ul style="list-style-type: none"> • Review service quality and outcome data quarterly to determine the Area Agency on Aging's (AAA) progress toward achieving performance targets and compliance with area plans.
ADRC Options Counseling	Number of Iowans receiving Options Counseling service. (297_04500_004)	2,061	2,785	<ul style="list-style-type: none"> • Annually review service data to identify trending service topics & unserved/underserved consumers or groups. • Ensure person-centered service delivery approach and cultural competencies among ADRC personnel statewide. • Provide training on most frequently requested call topics & programs and services for identified target populations.

What Happened: In SFY 2023, Iowa's ADRC network responded to 57,512 requests for information, referrals, and assistance from 22,125 individuals, which was an increase of 5,821 from SFY 2022. Ninety-nine percent of callers who indicated they received the information they were looking for when calling.

Similarly, in SFY 2023, Iowa's AAAs provided options counseling to 2,785 individuals, an increase of 1,572 individuals from SFY 2022. Of those options counseling consumers surveyed, the vast majority (94 percent) indicated they were provided enough information to make an informed decision on goal and service needs.

Due to the influx of additional American Rescue Plan Act funding and new consumers in SFY 2021 as a result of the COVID-19 pandemic, it has been difficult to determine a target for the number of individuals receiving Information & Assistance and Options Counseling.

Person Centered Planning (PCP) practices continue to be a cornerstone of both Information & Assistance and Options Counseling. Person Centered Practices have received the highest recommendation from the Administration for Community Living [ACL]. The Iowa Department on Aging partnered with the National Center for Advancing Person Centered Practices and Systems (NCAPPS) on a technical assistance project for improving person-centered practices across the state.

In SFY 2023, IDA continued activities to strengthen the ADRC. Major activities included:

- Providing technical assistance on program delivery and improving training for person-centered counseling;
- Using data to inform best practices for information and referral and identify unmet needs;
- Providing opportunities for partnerships across the ADRC through the No Wrong Door Stakeholder group, Public Health Workforce Rural Options Counseling Project, and LifeLong Links work group, Secret Shopper I&A Project, among other projects.
- Partnering with local AAAs for continued alignment of the Information and Assistance services with other Older Americans Act programs for statewide continuity and consistency for both improved service delivery and accurate data reporting.

Data Source: WellSky Aging & Disability System.

Resources: Funding for this program is a combination of Federal Older Americans Act, Title IIIB: \$732,106, Title IIIE: \$755,764, State General Funds: \$2,410,584, Discretionary Grant: \$3,918 and Other: \$1,054,669 totaling \$4,957,041.

Service: Long Term Care Ombudsman (LTCO)

Description: The mission of the Office of State Long-Term Care Ombudsman (OSLTCO) is to protect the health, safety, welfare, and rights of individuals residing in long-term care by investigating complaints, seeking resolutions to problems, and providing advocacy with the goal of enhancing quality of life and care. *(Links to Strategic Plan Goal 3: Iowa Aging Network will protect and enhance the rights and prevent the abuse, neglect, and exploitation of older Iowans and Iowans with disabilities.)*

Why we are doing this: In 1978, the Older Americans Act mandated a State Long-Term Care Ombudsman office in each state. The purpose of the office is to improve the quality of life and care in long-term care facilities by assisting residents to resolve complaints about the care they receive and to assure that residents’ civil and human rights are protected.

What we’re doing to achieve results: Iowa’s long-term care ombudsmen investigate to help resolve resident and family concerns, provide information and assistance to long-term care providers, offer educational programs to the community, volunteers and long-term care staff, and provide individual consultation on issues important to residents, their families or the public. Long-term care ombudsmen also assist with resident and family councils within long-term health care facilities. The internal processes of the office are continually reviewed for effectiveness and efficiency, and the state, local and volunteer long-term care ombudsmen participate in frequent training.

Results

Performance Outcome	Performance Outcome Measures	FY 2023 Target	FY 2023 Actual	Link to Strategic Plan
Improve the quality of life and care in long-term care facilities by assisting residents to resolve complaints about the care they receive and to assure that residents’ civil and human rights are protected.	Percent of Long-Term Care Complaints Resolved (297_04502_002)	68%	65%	Goal 3: Iowa Aging Network will protect and enhance the rights and prevent the abuse, neglect, and exploitation of older Iowans and Iowans with disabilities.
	Percent of nursing facilities with a volunteer ombudsman (297_04502_001)	10%	12.82%	

* Depending on ability to enter long-term care facilities due to COVID-19 restrictions

What Happened:

During SFY 2023, the local Long-Term Care Ombudsman program opened 682 cases, closed 711 and processed 774 cases, handled 1,269 complaints and made over 15,687 contacts to residents, families and staff members. The top five complaints investigated were:

1. Discharge or eviction
2. Response to requests for assistance
3. Visitors
4. Personal hygiene
5. Personal property

The Office of the State Long-Term Care Ombudsman (OSLTCO) also administers the activities of the Managed Care Ombudsman Program (MCOP) and the Certified Volunteer Ombudsman Program (VOP).

The Managed Care Ombudsman Program advocates for Medicaid managed care members who receive long-term services and supports (LTSS) through one of the seven home and community-based services (HCBS) waiver programs. The program worked with 388 Medicaid managed care members from July 2022 through June 2023 from individuals seeking assistance with their managed care plan.

The Volunteer Ombudsman Program utilized volunteers who perform monitoring visits at assigned nursing facilities to assist in resolving basic resident concerns. In FY 2023, 34 Iowans volunteered their service as volunteer ombudsmen in 436 nursing facilities across the state.

Data Source: Office of State Long-Term Care Ombudsman; Ombudsman manager.

Resources: Funding for this program is \$1,475,025 which comes from the General Funds.

Service: Office of the Public Guardian

Description: The mission of the Office of the Public Guardian is to improve Iowa's guardianship system by increasing access to information and services for individuals who need assistance with decision-making; by educating the public about guardianship, conservatorship, and less restrictive alternatives; by assisting the courts with education and training for guardians and conservators; and by providing public guardianship services of last resort. The Office of Public Guardian works to ensure that Iowans who require the assistance of a guardian, conservator, or other substitute decision-maker are able to direct their own decisions, including future decisions, to the fullest extent possible and according to their self-defined preferences and needs. (*Links to Strategic Plan Goal*

3: Iowa Aging Network will protect and enhance the rights and prevent the abuse, neglect, and exploitation of older Iowans and Iowans with disabilities.)

Why we are doing this: The Office of Public Guardian was established by the Iowa general assembly in 2005 and has been tasked with providing public guardianship services to adults when no private guardian or conservator is available; assisting both public and private guardians and conservators throughout the state in identifying and securing necessary services for their protected persons; and assisting guardians, conservators, protected persons, courts, and attorneys in the orderly and expeditious handling of guardianship and conservatorship proceedings.

What we’re doing to achieve results: The Office of Public Guardian is engaged in the following activities:

- Establishing, monitoring, and overseeing local offices of public guardian;
- Working with HHS, the Iowa developmental disabilities council, and other agencies to develop a referral system for the provision of guardianship and conservatorship services;
- Developing and maintaining a current listing of public and private services and providers available to assist protected persons and their families;
- Establishing and maintaining relationships with public and private entities to assure the availability of effective guardianship and conservatorship services;
- Providing information and referrals to the public regarding guardianship and conservatorship; and
- Developing a guardianship and conservatorship education and training program, in cooperation with the judicial council.

Results

Performance Outcome	Performance Outcome Measure	FY 2023 Target	FY 2023 Actual	Link to Strategic Plan
lowans who utilize guardian, conservator, or other substitute decision making services are able to direct their own decisions, including future decisions, to the fullest extent possible and according to their self-defined preferences and needs.	Number of individuals who received training on guardianship, conservatorship, and other substitute decision making topics. (297_04504_002)	750	780	Goal 3: Iowa Aging Network will protect and enhance the rights and prevent the abuse, neglect, and exploitation of older Iowans and Iowans with disabilities.

What Happened: The Office of Public Guardian contracts with professional guardians to serve as local offices of public guardian to provide guardianship and conservatorship

services throughout the state. In FY2023 the office issued a new request for proposals (RFP) for providers to serve as local offices. The existing contractor did not renew their contract or submit a proposal in response to the RFP. This led to the establishment of two new local offices of public guardian. As a result, the office oversaw the transfer of 68 existing cases from the previous local office contractor to the two new contractors. This transfer required court action in all 68 cases in order for the previous contractor to resign as guardian and/or conservator and the appropriate new local office to be appointed as successor. The office continued to use federal Covid-19 relief funding received in FY2022 to provide services to clients whose cases were accepted in FY2022. The local offices served a total of 103 consumers in FY2023. This is a 2.8%% decrease from FY2022.

The Office of Public Guardian continues to act as a resource to the public, providing information and referrals for guardianship and conservatorship services as well as other services that can assist lowans to maximize their independence and self-direction in decision-making. The FY2023 target of 750 for the number of individuals who received training on guardianship, conservatorship, and other substitute decision making topics was set between the FY2021 actual number of 1,011 and the FY2022 actual number of 478.. The actual number of people receiving training depends on the number of presentations done and the size of the groups or organizations requesting training from the Office of Public Guardian. In FY2023, the office presented twelve times and participated in eleven meetings of a resource group for families of transition-aged youth with disabilities. The total number of individuals reached was 780. .

Data Source: Office of the Public Guardian.

Resources: Funding for this program was \$536,600, \$380,000 from the State General Fund, \$107,500 in ARPA funding provided by IGOV, \$43,000 from a partnership with the Iowa Department of Health and Human Services Adult Protective Services, and \$6,100 from Medicaid Administrative Claiming.

Core Function: Health and Support Services

Description: Support policies, programs, and wellness initiatives that promote healthy lifestyles for older lowans and that improve their access to affordable, high quality long-term living and community supports.

Service: Nutrition and Health Promotion

Description: As lowans age, many require support services to stay healthy, active and independent. IDA, the AAAs, and their providers deliver these support services including congregate and home delivered meals, nutrition education and counseling, and health promotion programs. Family caregivers may also receive meals through OAA nutrition

programs to help support their role as a caregiver. *(Link to Strategic Plan Goal 2: Iowa Aging Network will enable older Iowans to remain in their own residence and community of choice through the availability of and access to high quality home and community services and supports, including supports for families and caregivers.)*

Why we are doing this: The Older Americans Act funds support the nutrition and health promotion programs to reduce hunger and food insecurity, promote socialization, and promote health and well-being of older individuals in order to delay the onset of adverse health conditions.

What we’re doing to achieve results: IDA supports the AAAs and their community networks that provide home and community-based services. These include congregate and home delivered meals, nutrition education and nutrition counseling and evidence-based health promotion programs. Support from IDA staff provides technical assistance for the AAAs to help them meet the objectives of the OAA and older Iowans’ goals for independent living. Department staff also review program performance and monitor compliance with federal and state regulations.

Results

Performance Outcome	Performance Outcome Measures	FY 2023 Target	FY 2023 Actual	Link to Strategic Plan
Enable older Iowans to remain in their own homes and communities with high quality of life for as long as possible through the provision of home and community-based supports and services.	Of congregate meal consumers who may be socially isolated, percentage eating 4 meals at meal site in a month. (297_34302_003)	85%	62%	Goal 2: Iowa Aging Network will enable older Iowans to remain in their own residence and community of choice through the availability of and access to high quality home and community services and supports, including support/s for families and caregivers.
	Of home delivered meal consumers who may be socially isolated, percentage receiving at least 8 meals in a month. (297_34302_004)	85%	89%	
Ensure meal participants who may be socially isolated have the opportunity to connect with their community thereby addressing quality of life and social determinants of health.				By the end of SFY2023, 170 traditional congregate nutrition sites had reopened after pandemic-related closures, along with 35 innovative Iowa Cafe sites..

Services	Service Measures	FY 2023 Target	FY 2023 Actual	Strategies/Recommended Actions
Older Americans Act - Home and Community Based Nutrition, Supportive, and Elder Rights Services	Number of older Iowans receiving at least 1 OAA nutrition, supportive, or elder rights service (297_34302_006) [GENERAL AGING REG Service]	50,000	52,688	<p>Access to grant funding and supplemental pandemic relief funding supported Area Agencies on Aging in exceeding SFY2023 congregate meals targets. Increasing costs and emerging wait lists reduced AAA capacity to serve home delivered meals, falling short of the target.</p> <ul style="list-style-type: none"> • Review service quality and outcome data quarterly to determine each AAA's progress toward achieving its agency performance targets and compliance with its area plan. • Promote meal programs as a health promotion service to organizations such as health care providers, hospital discharge planners, third party payers, and caregivers.
Home Delivered Meals	Number of older Iowans receiving a Home Delivered Meal (297_34302_007)	13,314	11,038	<ul style="list-style-type: none"> • Implement referral methods for consumers whose intake or assessment responses show indicators of social isolation and identify strategies to keep those consumers engaged. • Implement referral methods for consumers whose intake or assessment responses show indicators of risk for institutionalization or need for additional supports.
Congregate Meals	Number of older Iowans receiving a Congregate Meal (297_34302_008)	15,800	19,772	<ul style="list-style-type: none"> • Provide technical assistance to the AAA nutrition directors on: <ul style="list-style-type: none"> ○ Leveraging data to evaluate program targeting and reach. ○ Identifying new population groups and traditionally underserved consumers; increasing access and quality of nutrition services, including availability of medically-tailored and culturally-relevant meals. ○ Developing and refining consumer prioritization systems to effectively target services to those in greatest need and address emerging wait lists.

What Happened: In SFY 2023, Iowa’s OAA nutrition programs provided 2.118 million congregate and home delivered meals to 29,467 older Iowans. Iowa’s OAA nutrition programs worked to balance growing to meet increasing need with planning for and sustaining services beyond innovation project grant funding and supplemental pandemic relief funds for nutrition services.

Prior to the pandemic, congregate nutrition participation was declining across the state. However, innovative strategies first implemented in SFY2021 continued to attract more new consumers to OAA nutrition services. Iowa HHS ADS continued to support AAAs in the implementation of a new service delivery model leveraging partnerships between AAAs and licensed foodservice establishments including restaurants, cafes and grocery stores. This model provides Iowans with nutritious meals and opportunities for socialization, with greater choice and dignity. As a result, statewide participation in congregate nutrition services grew an additional twenty (20) percent during SFY2023. In SFY2023, the new service delivery model, branded The Iowa Café, delivered twenty-five (25) percent of congregate meals and served forty-four (44) percent of congregate nutrition consumers statewide. This model was found to attract higher rates of consumers who are historically under-represented in congregate nutrition programs in the state, including those age sixty (60) to seventy-four (74) and those who are more culturally and racially diverse. The Iowa Café also reaches higher rates of consumers who are at high nutrition risk and consumers living with food insecurity compared to the traditional model.

Demand for home delivered meals remains high, representing sixty-three (63) percent of meals served in SFY2023. Fifty-five (55) percent of home delivered nutrition program participants were considered at high nutrition risk, and eighteen (18) percent of home delivered nutrition program participants were considered food insecure.

Due to increasing costs and AAA capacity to provide services, wait lists for both home delivered and congregate nutrition services continued to grow in SFY2023. By the end of SFY2023, nutrition services wait lists included four hundred fifty (450) congregate nutrition consumers and four hundred forty-eight (448) home delivered nutrition consumers statewide. An additional one thousand, four hundred ninety-six (1,496) congregate nutrition consumers and one hundred sixty-four (164) home delivered nutrition consumers’ needs are characterized as unmet needs, meaning Iowa’s AAAs expect that those consumers will wait more than six months for services. Iowa’s Area Agencies on Aging worked to further develop and refine consumer prioritization systems. As a result, more consumers were found to be at high nutrition risk, living with food insecurity and at risk for isolation in SFY2023. HHS ADS continued to provide technical assistance related to consumer prioritization, meal cost, new partnerships and other sustainability strategies.

Older lowans have the opportunity to learn about good nutrition, the positive impact of maintaining physical fitness and wellness and other health information through nutrition education and nutrition counseling services. Nutrition education played an important role in improving the program by addressing nutrition risk factors. Programming was aimed at improving senior health by promoting consumption of more fruits and vegetables, increasing physical activity, and providing food safety awareness through the distribution of educational materials and regular presentations to congregate and home delivered meal recipients. Virtual nutrition education programs like Words on Wellness (Iowa State University) and Fresh Conversations (Iowa Department of Public Health) continue to be available. Virtual programming continues to be offered on a monthly basis in some areas even after congregate sites have reopened. This has allowed AAAs the opportunity to continue providing nutrition education to those who may be a high nutrition risk yet unable to attend congregate sites. Nutrition Counseling offers individualized information for those older lowans who want guidance on their nutrition or who are at nutritional risk because of their current or past health status. A registered dietitian uses one-on-one counseling to provide individualized education, medical nutrition therapy, as needed, and create action plans that can be used to maximize health and independence through diet and lifestyle. Through SFY 2022 IDA provided continued technical assistance to AAAs to improve their Nutrition Counseling screening and intervention process.

Health promotion and disease prevention activities coordinated through the AAAs are designed to prevent or address health conditions that could reduce the length of stay or improve quality of life for older lowans. Activities often include health screening and assessments, organized physical fitness activities and evidence-based Falls Prevention or Chronic Disease Self-Management programs. Evidence-based programs offered during this time included Matter of Balance, Walk with Ease, Community Aging in Place - Advancing Better Living for Elders, Home Hazard Removal Program, Home Meds, Powerful Tools for Caregivers, Stepping On, Tai Chi for Arthritis, Better Choices Better Health, Bingocize and Stressbusters.

Major activities conducted:

- SFY2023 nutrition consumers increased eight percent statewide compared to SFY2022, from 27,368 to 29,467 consumers. Congregate nutrition participation increased by twenty (20) percent and congregate meals served increased by twenty-seven (27) percent compared to SFY2022.
- Iowa was one of eleven (11) ACL awardees for the 2020 Innovations in Nutrition Program Grant, in September 2020, launching The Iowa Café project with Elderbridge Area Agency on Aging. Northeast Iowa Area Agency on Aging joined as a grant partner for year 2. The Consolidated Appropriations Act 2021 supplemental funding for nutrition allowed further expansion. With support from the Office of the

Lieutenant Governor and the Iowa Economic Development Authority, the Iowa Café project is modernizing Iowa's congregate meal program infrastructure, delivery mechanisms and outreach to increase the number of consumers and meals served. By the conclusion of the grant cycle, innovative partnerships between AAAs and licensed foodservice establishments had expanded to include 35 restaurants, cafes and grocery stores that provided Iowans with nutritious meals and opportunities for socialization, with greater choice and dignity. These partnerships were the driving force behind the increase in congregate nutrition participation. Iowa HHS ADS continues to work with ACL and the National Resource Center for Nutrition and Aging to release replication guide materials and participate in webinars and national conferences featuring the project.

- IDA was awarded an ACL Falls Prevention grant beginning in August 2020 with the goal of improving the ability of older adults and adults with disabilities to live safely in their homes. The project uses the evidence-based program, CAPABLE, to reduce in-home falls risk. In year three, CAPABLE was offered in Cass, Dallas, Mills, Pottawattamie, Polk, Woodbury and Monona counties. Service delivery increased and the grant cycle concluded with 90 individuals served over the three year period.
- IDA developed data visualization tools to support AAAs in evaluating the reach of programs, service delivery models and providers, and to support stakeholder education and other sustainability activities.
- IDA collaborated with the Iowa Food Bank Association to strengthen partnerships between Iowa's Area Agencies on Aging and local food banks and food pantries. These partnerships increased access to food boxes and food pantry delivery services for older adults living with food insecurity statewide. Partners also collaborated on strategies to address SNAP misinformation and increase SNAP enrollment among food insecure older adults.
- In SFY2023, Nutrition counseling increased 6% from SFY2022, serving 170 individuals.
- Over 21,000 older Iowans received nutrition education, a 17% increase from SFY 2022.
- 6,968 people were served with either evidence-based or non-evidence-based health promotion service in SFY2023.
- 578 people were served with evidence-based health promotion programming in SFY2023, a 33% increase from SFY2022.

Data Source: WellSky Aging & Disability System and Iowa Financial Reporting System (IAFRS).

Resources: Funding for these programs represents a combination of Federal Older Americans Act Title IIIB: \$408,585, IIIC (1): \$5,681,693, IIIC (2): \$5,732,413, IIIE: \$389,981, Nutrition Services Incentive Program: \$1,461,129, State General Funds: \$2,839,628, and Other: \$8,609,312 totaling \$25,122,741.

Service: Case Management

Description: Case Management promotes and supports independent living of older lowans by helping them coordinate the home and community-based services and supports they need. Case Management service delivery focuses on at-risk, older lowans who require various supports and services, but are not eligible for the Medicaid Elderly Waiver Program. The service of Case Management enables active intervention and advocacy on behalf of older lowans by helping participants locate necessary services and resolve issues with service providers before a situation escalates to the point where it adversely affects the individual’s health and overall well-being. *(Link to Strategic Plan Goal 2: Iowa Aging Network will enable older lowans to remain in their own residence and community of choice through the availability of and access to high quality home and community services and supports, including supports for families and caregivers.)*

Why we are doing this: Older lowans want to live in their own homes with dignity and independence for as long as possible. Case management coordinates individualized services that help older lowans achieve their independent living goals. Typically, coordinated case management services offers an array of long-term living and community supports, including support for family caregivers and can be provided at approximately one fourth of the cost to the taxpayer when compared to facility-based care. Case managers evaluate both health and social needs of the individual needing care during an in-home visit, develop a personalized plan of care, coordinate individualized services and provide ongoing monitoring of the individual’s plan. Case management provided to individuals and family caregivers enable lowans to remain in their homes and communities with high quality of life for as long as possible.

What we’re doing to achieve results: The Area Agency on Aging (AAA) case managers or their subcontractors provide ongoing monitoring on an annual or more frequent basis if needed, to assess the needs of the consumer as well as conduct consumer satisfaction surveys.

Performance Outcome	Performance Outcome Measures	FY 2023 Target	FY 2023 Actual	Link to Strategic Plan
Case Management	Average Number of months a Case Management consumer experiencing independent living impairments is able to remain safely at home prior to transitioning to a facility. (297_34302_005)	20	20.23	Goal 2: Iowa Aging Network will enable older lowans to remain in their own residence and community of choice through the availability of and access to high quality home and community services and supports, including support/s for families and caregivers.

Service	Service Measure	FY 2023 Target	FY 2023 Actual	Strategies/Recommended Actions
Case Management	Number of older lowans with an independent living impairment receiving Case Management service (297_34302_009)	1,200	852	<ul style="list-style-type: none"> • Review service quality and outcome data quarterly to determine each AAA’s progress towards achieving its agency performance targets and compliance with its area plan. • Prioritize partnerships with different types of service providers to ensure appropriate referrals for targeted populations. • Increase outreach and education efforts. • Utilize assessment tool to determine if the individual is unable to perform at least two activities of daily living without substantial assistance (including verbal reminding, physical cuing or supervision). Proceed with referral to case management to ensure consumer receives a wide variety of services to provide assistance that will enable them to remain in their home.

What Happened: In SFY2023, the OAA case management program focused on meeting essential needs while adapting services and delivery methods to help protect the safety and wellbeing of older lowans. During the COVID-19 pandemic, additional precautions were made to ensure AAA staff safety as well as the wellness of the vulnerable population they serve. One of the major trends that case managers identified during SFY 2023 was increased needs of case management consumers after the pandemic. Case management consumers are already individuals with some of the greatest needs. The overall needs of many consumers receiving case management have become significantly more complex; more substance abuse, mental health issues and a decrease in available resources have been identified. Many community partners in each local PSA closed their doors after the pandemic, which has resulted in a provider shortage. Case management combines an optimum package of services and coordination of those services. Because of this, it has been more challenging to make referrals to appropriate services that would assist in meeting the needs of case management consumers. The consumer’s whole-health is addressed in the assessment (including physical, psychological, and social needs of the individual). In SFY 2023, older lowans that received case management also received homemaker, information and

assistance, home delivered nutrition, nutrition education and emergency response system as their other most common registered services.

In SFY 2023, 850 case management consumers were served. This is a 1% increase from the 838 consumer count in SFY 2022. There was also a 10% increase in units which indicates that the average case management consumer may have higher needs and require more AAA staff time, as mentioned above. In order to meet the complex needs of their consumers, AAAs have made efforts to increase their partnerships in their respective communities, despite the challenge of provider shortages. AAAs will continue these efforts and will target partnerships that can address substance abuse and mental health issues. These partnerships are intended to strengthen Iowa's Aging Network.

Data Source: WellSky Aging & Disability System.

Resources: Funding for this program is a combination of Federal Older Americans Act, Title IIIB: \$954,674, IIIE: \$98,593, VII: \$69,405, State General Funds: \$309,709, and Other: \$,154,388 totaling \$1,586,769.

Service: Caregiver Services

Description: Caregiver services offer an array of long-term living and community supports that are instrumental in helping older lowans remain in their homes. Caregiver services are primarily supported by Older Americans Act funds and assists persons 18 years of age and older who care for a frail older adult. A small portion of Caregiver funds allows for services for grandparents or other older relatives supporting dependent minors or adults living with a disability. *(Link to Strategic Plan Goal 2: Iowa Aging Network will enable older lowans to remain in their own residence and community of choice through the availability of and access to high quality home and community services and supports, including supports for families and caregivers.)*

Why we are doing this: Family caregivers, who are often unpaid caregivers, are critical partners in helping older lowans remain in their homes. Family and friends who serve as caregivers, however, often do not identify themselves as caregivers and thus do not seek out assistance. Supporting caregivers in locating and providing information and services for their loved ones allows many caregivers to continue their efforts longer, which often delays more costly institutional care.

What we're doing to achieve results: The Iowa Aging Network is building support for family caregivers to ensure the services they need to sustain their role as a caregiver, and to maintain their emotional and physical health, are available and accessible to them. The focus of the program is to provide information about available services,

facilitate access to services and assist caregivers on their journey through counseling, support groups and training. In doing so, Caregiver services allow them to sustain their caregiving role and maintain their emotional and physical health.

Results

Performance Outcome	Performance Outcome Measures	FY 2023 Target	FY 2023 Actual	Link to Strategic Plan
Caregivers have access to services that allow them to sustain their caregiving role and maintain their emotional and physical health.	Percentage of caregiver consumers indicating caregiver counseling and/or respite service allowed them to maintain their caregiver role. (297_34303_002)	85%	83%	Goal 2: Iowa Aging Network will enable older Iowans to remain in their own residence and community of choice through the availability of and access to high quality home and community services and supports, including support/s for families and caregivers.

Service	Service Measure	FY 2023 Target	FY 2023 Actual	Strategies/Recommended Actions
Caregiver Access Assistance and Supportive Services	Number of Iowans receiving assistance from at least one caregiver service. (297_34303_001) [CAREGIVER Registered Consumers]	5,505	4,793	<ul style="list-style-type: none"> • Review program quality and outcome data to determine progress toward performance targets and compliance with area plan. • Consult with the AAAs on targeting at-risk caregivers that may be caring for individuals with dementia, experiencing significant stress, reduced employment and/or developing health issues. • Identify training opportunities through quarterly AAA collaborative meetings. • Participate in partner organization committees and other collaborations with providers to increase awareness of caregiver supports.

What Happened: The SFY 2023 performance target was 85%. This target was almost met by the AAAs as 83% of caregivers indicated counseling and/or respite services allowed them to maintain their caregiving role. Typically, over time, caregivers find increased burden and strain as the health and/or mental capacity of the care recipient decreases. Family Caregivers caring for someone with dementia indicate a high strain level of 88.1%. Caregivers receive information services or other supportive services, such as options counseling, counseling, and home delivered meals from the AAAs and contracted providers. In SFY 2023, Iowa HHS ADS projected that the AAAs would serve 5,505 Iowans

with at least one caregiver service. Actuals show that 4,793 lowans received at least one caregiver service. These services included either one-on-one or support group counseling, training, respite care and educational opportunities to caregivers through local support groups, evidence-based training classes (Powerful Tools for Caregiver) and statewide/regional caregiver conferences. There was a shift from in-person services to virtual services since the COVID-19 pandemic. Caregivers have voiced that in-person is preferred as this provides more of a connection to others that are going through the same journey as a caregiver and offers support even outside of the support group attended through relationships built. The COVID-19 pandemic and staff shortages have also had an impact on the ability to find providers that are able to offer the needed services.

In SFY 2023, IDA continued activities to strengthen the caregiver program. Major activities included:

- Provided virtual technical assistance on federal requirements and standard operating procedures;
- Conducted monitoring of all six AAA Family Caregiver programs for compliance with Chapter 14;
- Continued to enhance the support for Iowa Caregivers with the Iowa team by participating in a national initiative and webinar with the Center for Health Care Strategies [CHCS] entitled *Helping States Support Families Caring for an Aging America*. The project involved six states committed to developing policies or programs to support family caregivers and address the needs of an aging population;
- Participated in technical assistance calls with CHCS and other states on caregiving topics to support caregiving policy and programs
- IDA collaborated with the Public Health Division, AAAs and other Iowa agencies through significant workgroups to strengthen the partnerships that increase awareness and progress towards better supporting lowans with Alzheimer's Disease and related dementias and their caregivers;
- Partnered with an AAA to develop a resource tool for Iowa caregivers that is now part of the annual Iowa Caregivers Conference participant booklet. This tool ensures caregivers know the resources available in Iowa to aid in helping them maintain their role and well-being;

Data Sources: WellSky Aging & Disability System and IAFRS

Resources: Funding for this program is a combination of Federal Older Americans Act, III E: \$1,141,791, VII: \$43,807, State General Funds: \$308,546, and Other: \$456,318 totaling \$1,950,462. Note: Title III E funding is used across multiple service areas to provide

caregiver supports. Refer to references on Title III E funding in ADRC and Nutrition Services for additional caregiver expenditure information.

Core Function: Planning, Development and Coordination

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

Activity: Oversight & Operations

Description: IDA is responsible for the application and receipt of Older Americans Act funds as well as state appropriations. IDA is a focal point for all activities related to the needs and concerns of older Iowans. Staff serve as advocates for older persons by:

- Reviewing and commenting upon all state plans, budgets, and policies that affect elders.
- Providing technical assistance to any agency, organization, association, or individual representing the needs of elders.
- Assuring that preferences for services will be given to older individuals with greatest economic or social needs.
- Assuring that preference for services will be given to low-income minority and rural older adults.

Staff review mandated program and financial reports from the AAAs in order to evaluate the effectiveness of Older Americans Act programs in meeting the needs of older Iowans. IDA has updated its data collection and analysis tools to facilitate reporting and service delivery evaluation.

Why we are doing this: IDA is ensuring data sharing among state agencies and other aging network partners to better identify high risk older adults and family caregivers.

What we're doing to achieve results: IDA staff provides ongoing technical assistance and training on quality data collection procedures to the AAAs. They also work with the AAAs to review and analyze program data to determine outcomes of client services and identify unserved / underserved consumers, service delivery gaps, and resource utilization efficiencies. The collection of consumer demographic and functional impairment information through the intake form is vital to determining service delivery reach, quality, and impact.

Results

Performance Outcome	Performance Outcome Measures	FY 2023 Target	FY 2023 Actual	Link to Strategic Plan
The Department on Aging operates with highest efficiency, transparency and accountability.	Percent of consumers who receive registered service that complete a Consumer Intake Form once during the state fiscal year. (297_67_200)	90%	90%	Effective & Responsive Management
Accurate data sharing among state agencies and other aging network partners to better identify high risk older adults and caregivers	Number of reportable comments in the annual audit pertaining to the Department. (297_67_300)	0	0	

*Most recent departmental audit report completed was for SFY 2022.

What Happened: In FY2023 IDA achieved our 90% target in the number of concerns who completed an intake form with 0 reportable comments in the annual audit. IDA and AAA staff utilize a continuous improvement process to ensure the reporting system meets the aging network’s needs. IDA routinely monitors and provides technical assistance on ensuring accurate and complete consumer and service data in order to evaluate service delivery reach, quality, and impact. Agencies with a greater than 10% missing intakes or missing data provide explanations for the missing rate and identify solutions to correct.

Resources: Funding for IDA and the AAA staff activities comes from a combination of federal Older Americans Act appropriations, state general funds, and other sources.

Activity: Resource Management

Description: IDA management and fiscal staff developed and trained AAA staff on new policies and procedures to assist the six AAAs in expanding their operations.

Why we are doing this: To ensure effective administration of IDA.

What we’re doing to achieve results: Management staff trained and provided support to Department and AAA staff on contracting rules, procurement policies, match requirements, and other financial matters to ensure compliance.

What Happened: The audit resulted in no reportable comments.

Data Source: The SFY 2022 Audit Report.

Resources: Funding for IDA and the AAAs comes from a combination of federal Older Americans Act appropriations, state general funds, and other sources.

Activity: Resource Reallocation

In SFY 2023, the Iowa Department on Aging did not reallocate any resources.

Agency Contact

Copies of the *Iowa Department on Aging Performance Results Report* are available on the website at <https://dom.iowa.gov/planning-performance> or email Eugenia Kendall at Division of Aging and Disability Services: eugenia.kendall@iowa.gov.

**Iowa Health and Human Services
Division of Aging and Disability Services
510 East 12th Street, Suite 2
Des Moines, IA 50319
Telephone: 515-725-3333
TTY Accessible Telephone Number: (800) 532-3212
WATS: 1-800-532-3212**