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Agency on Aging
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2027-2030

Area IV 4-Year Plan

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2027-2030

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Section 1. PSA Context and Community Profile

1.1 Planning and Service Area Overview

Area IV Agency on Aging serves Broadwater, Gallatin, Jefferson, Lewis & Clark, Meagher, and Park Counties in southwest and west-central Montana. The Planning and Service Area include the regional centers of Helena and Bozeman, as well as extensive rural and frontier communities characterized by long travel distances, transportation limitations, workforce shortages, and other barriers that affect access to services.

Operating under the auspices of Rocky Mountain Development Council, Area IV is guided by an Area Agency on Aging Board and Advisory Council that support planning, community engagement, and service delivery for older adults, family caregivers, and individuals with disabilities throughout the region.

1.2 Demographic Characteristics

Area IV serves a population of approximately 244,000 residents, including more than 59,000 adults age 60 and older. The Planning and Service Area includes the regional centers of Helena and Bozeman, which serve as hubs for healthcare, government, commerce, and aging services.

While these urban centers anchor the region, much of Area IV is rural and frontier in nature. Long travel distances, transportation barriers, workforce shortages, housing affordability challenges, and limited access to healthcare and community-based services affect many older adults, particularly in Broadwater, Jefferson, Meagher, and Park Counties.

Continued population growth, particularly in Gallatin County, and an aging population throughout the region are expected to increase demand for transportation, caregiver support, nutrition services, information and assistance, dementia services, and home and community-based supports during the 2027-2030 Area Plan period.

Table 1. Area IV Population Summary (2024)

Population Type within Area IV	Total # in Area IV /PSA	% Of Area IV / PSA Population
Total Area Population	243,858	100%
Total Area Population 60+	59,680	24.24%
African American 60+	140	0.23%
American Indian 60+	643	1.08%
Asian 60+	389	0.65%
Hispanic/ Latino 60+	1,152	1.93%
Poverty (low-income) 60+	4,829	8.08%
Poverty (low-income) Minority 60+	241	0.40%
Limited English proficiency 65+	1,154	0.47%
Individuals Residing in Rural Areas/ Isolated 60+	41,607	17.08%
Individuals with Alzheimer's Disease and Related Disorders 65+	15,851	6.5%
Individuals Living Alone 65+	11,332	4.65%
Grandparents Raising Grandchildren/Kinship Caregivers 60+	357	0.60%
Individuals with Disabilities 65+	12,818	5.26%
Veterans 65+	8,365	3.43%
Individuals at Risk for Institutional Placement 65+	12,818	5.26%

See Attachment 2A for detailed county demographic profiles for Broadwater, Gallatin, Jefferson, Lewis & Clark, Meagher, and Park Counties

Table Notes: Population estimates are derived from the U.S. Census Bureau Population Estimates Program (PEP), American Community Survey (ACS), Montana Department of Commerce population data, and other publicly available planning resources. Veteran, disability, living-alone, and limited English proficiency estimates are reported for individuals age 65 and older where age 60+ estimates are unavailable. Alzheimer's Disease and Related Disorders estimates are based on county prevalence estimates and should be considered planning estimates.

1.3 Populations with Greatest Economic and Social Need

Consistent with the Older Americans Act, Area IV prioritizes outreach and services to older adults with the greatest economic and social need, including low-income individuals, rural and frontier residents, older adults living alone, individuals with disabilities, family caregivers, veterans, Tribal members, individuals experiencing transportation barriers, and those at risk of social isolation or housing instability. These populations often face increased barriers to transportation, healthcare, affordable housing, nutrition services, caregiver support, and other community-based services.

Area IV serves more than 59,000 adults age 60 and older. Within this population, approximately 4,829 older adults live below the federal poverty level, more than 11,000 adults age 65 and older live alone, over 12,000 adults age 65 and older have a disability, and more than 8,000 older veterans reside within the Planning and Service Area. These populations represent priority groups for outreach, service delivery, and resource allocation efforts.

Although no federally recognized reservation is located within the Planning and Service Area, Tribal members reside throughout the region. Area IV works with organizations such as the Helena Indian Alliance and other community partners to promote equitable access to services for Tribal members, culturally diverse populations, veterans, individuals with disabilities, and family caregivers.

The rural and frontier geography of Area IV presents ongoing service delivery challenges. Long travel distances, workforce shortages, limited transportation options, healthcare access constraints, housing affordability concerns, and uneven broadband availability can affect access to needed services and supports. These conditions reinforce the importance of coordinated home and community-based services that help older adults remain independent and age in place. **See Attachment 2B**.

1.4 Service Network and Key Partners

Area IV works with a network of senior centers, nutrition and transportation providers, public health departments, healthcare systems, local governments, Human Resource Development Councils, veterans' organizations, disability service organizations, and community-based nonprofits throughout the Planning and Service Area. Key partners include St. Peter's Health, Bozeman Health, the Helena Indian Alliance, and other organizations that support older adults, caregivers, and individuals with disabilities.

These partnerships support outreach, referrals, service coordination, transportation and nutrition services, caregiver support, health promotion activities, housing assistance, information sharing, and aging-in-place initiatives. Area IV benefits from the local expertise, geographic reach, and service capacity of its partners, while partners benefit from referrals, training, technical assistance, funding opportunities, and collaborative planning efforts.

Summary

Area IV's older adult population represents nearly one-quarter of the Planning and Service Area population and is expected to continue growing during the 2027-2030 planning period. Combined with the challenges associated with serving rural and frontier communities, including transportation barriers, workforce shortages, housing affordability concerns, and limited access to services, these demographic trends are expected to increase demand for transportation, caregiver support, housing assistance, Information and Assistance, and home and community-based services. These factors will continue to guide Area IV's planning priorities, resource allocation decisions, and service delivery strategies throughout the 2027-2030 Area Plan period.

Section 2. Needs Assessment and Unmet Need

Needs Assessment Process

Area IV Agency on Aging conducted a needs assessment using consumer surveys, public forums, stakeholder input, service utilization data, demographic information, contractor feedback, and community partner input to identify service gaps, unmet needs, and priority populations throughout the Planning and Service Area.

2.1 Data Sources

The needs assessment was informed by:

- Montana Statewide Aging Survey (POLCO/National Research Center)
- Public forums and listening sessions.
- Advisory Council recommendations
- Service utilization and expenditure data.
- Contractor monitoring and stakeholder feedback
- U.S. Census Bureau ACS data
- Montana Department of Commerce population data
- Consumer, caregiver, provider, and community partner input
- Customer satisfaction and program evaluation data
- Historical service utilization and performance data (FY2024-FY2026)

These sources provided a comprehensive assessment of needs, service gaps, and priorities for older adults and caregivers throughout Area IV.

2.2 Summary of Findings

The Montana Statewide Aging Survey conducted by POLCO/National Research Center included statistically valid responses from older adults throughout Montana, including **984 Area IV respondents**. Compared to prior survey findings, respondents reported increased concerns related to housing affordability, cost of living, transportation after driving cessation, caregiver burden, healthcare costs, and financial security. **See Attachment 2B**.

Across all assessment activities, transportation, housing, home and community-based services, caregiver support, social isolation, Information and Assistance, and economic security emerged as the most significant needs affecting older adults throughout Area IV. Service demand was frequently reported to exceed available resources, particularly in rural and frontier communities.

Findings from the Montana Statewide Aging Survey reinforced these priorities. Respondents reported the strongest outcomes in safety, physical health, mental health, and social engagement, while affordable housing, independent living support, employment opportunities, cost of living, access to mental health services, and long-term care options received the lowest ratings.

Additionally, 45% of respondents reported healthcare challenges, 43% reported housing challenges, 38% reported difficulty accessing information and resources, 37% reported physical health challenges, and 35% reported financial

challenges. These findings support continued investment in transportation, housing-related supports, caregiver services, Information and Assistance, benefits counseling, and home and community-based services.

The results of the needs assessment directly informed the goals, objectives, strategies, service priorities, and resource allocation decisions contained within this Area Plan. An executive summary of survey findings and related data are included in **Attachment 2B**.

2.2A Service Utilization Trends (FY2024-FY2026)

Area IV reviewed service utilization data from FY2024 through FY2026 to identify trends in service demand and program participation throughout the Planning and Service Area. Historical utilization patterns were analyzed in conjunction with demographic trends, public participation findings, stakeholder feedback, contractor input, and the Montana Statewide Aging Survey (POLCO).

Analysis of FY2024-FY2026 service utilization data identified several notable trends. Participation in congregate nutrition programs, caregiver support services, Senior Companion services, and evidence-based health promotion programs increased during the review period, indicating growing demand for opportunities that support social engagement, caregiver assistance, health promotion, and aging in place.

At the same time, utilization of transportation, homemaker, and home-delivered nutrition services declined. Although utilization decreased, public participation activities, stakeholder feedback, and survey findings continued to identify transportation, aging-in-place support, and access to in-home services as significant unmet needs. These trends suggest that workforce shortages, provider capacity limitations, geographic barriers, funding constraints, and service availability challenges may affect access to services in some communities.

Service utilization findings support continued monitoring of service demand and reinforce the importance of transportation, caregiver support, nutrition services, Information and Assistance, social engagement opportunities, and home and community-based services during the 2027-2030 planning period.

2.3 Priority Needs and Unmet Needs

Transportation

Transportation emerged as the most significant unmet need identified through the Area IV needs assessment. Older adults consistently reported barriers to accessing healthcare, shopping, nutrition services, and community activities, particularly in rural and frontier communities.

Survey findings indicate that transportation access is closely tied to an individual's ability to drive. While 71% of respondents positively rated their ability to get where they need to go, only 42% positively rated the overall transportation system and just 20% rated access to public transportation. Public input also identified transportation to medical appointments, access to services outside local communities, and travel between communities as persistent challenges.

Assessment findings demonstrate a continued need for transportation coordination, volunteer driver programs, and regional transportation solutions to support access to essential services and promote independence.

Housing and Aging in Place

Housing and aging in place emerged as significant unmet needs through the Area IV needs assessment. Older adults reported challenges related to housing affordability, accessibility, home maintenance, and the availability of housing options that support independent living.

Survey findings underscored these concerns, with only 7% of respondents rating the availability of affordable quality housing positively and 43% reporting housing-related challenges. Public input also identified shortages of affordable senior housing, home repair and modification services, and other supports that help older adults remain safely in their homes.

Assessment findings demonstrate a continued need for housing-related support and aging-in-place services that promote independence and community living.

Home and Community-Based Services

Home and community-based services emerged as a significant unmet need through the Area IV needs assessment. Older adults, caregivers, and stakeholders identified gaps in personal care, homemaker assistance, home health services, chore services, respite care, and other in-home supports that help individuals remain independent and age in place.

Workforce shortages, limited provider capacity, and the challenges of serving rural and frontier communities continue to restrict access to services. Public input also highlighted difficulties obtaining assistance with housekeeping, meal preparation, yard maintenance, snow removal, home repairs, and other daily living support.

Assessment findings demonstrate a continued need to strengthen the availability and accessibility of home and community-based services that support independence, reduce caregiver burden, and help older adults remain safely in their homes and communities.

Caregiver Support

Caregiver support emerged as a significant unmet need through the Area IV needs assessment. Caregivers consistently identified respite care, dementia education, caregiver training, resource navigation, and emotional support as critical needs. Caregiver stress, burnout, and the challenges of balancing caregiving responsibilities were recurring themes across assessment activities.

Findings from the POLCO survey highlight the substantial caregiving role older adults play within Area IV, with 36% of respondents reporting care responsibilities for another adult age 55 or older. Survey respondents and public participants identified respite services, dementia-related support, caregiver education, and access to reliable information and resources as priority needs.

Assessment findings also identified limited availability of respite providers and caregiver support services, particularly in rural and frontier communities. These findings demonstrate a continued need to expand caregiver support services, strengthen respite opportunities, and improve access to education and resource navigation for family caregivers throughout the Planning and Service Area.

Mental Health and Social Isolation

Mental health and social isolation emerged as ongoing concerns through the Area IV needs assessment. Older adults, caregivers, and community stakeholders identified loneliness, social isolation, depression, cognitive decline, and limited opportunities for social engagement as factors affecting well-being, particularly among individuals living alone and those residing in rural and frontier communities.

Findings from the POLCO survey indicate that 27% of respondents reported mental health challenges and only 27% positively rated the availability of affordable mental health services in their community. Public input also identified concerns related to loneliness, dementia-related safety issues, and limited opportunities for social connection.

Assessment findings demonstrate a continued need for services and support that reduce isolation and promote community engagement, including wellness checks, transportation services, caregiver support, volunteer opportunities, and social activities that support mental well-being and independence.

Information and Assistance

Access to information and assistance emerged as a significant need through the Area IV needs assessment. Older adults, caregivers, and community stakeholders reported difficulty identifying, understanding, and navigating available programs, services, and benefits.

Findings from the POLCO survey reinforced this need. While 61% of respondents reported being somewhat or very informed about available services, only 29% positively rated the availability of information about resources, and 38% reported challenges accessing information and assistance. Public input also highlighted the importance of trusted local information sources and person-centered assistance.

Assessment findings demonstrate a continued need to strengthen Information and Assistance services, improve outreach efforts, and support resource navigation to ensure older adults and caregivers can access available programs and support throughout the Planning and Service Area.

Economic Security

Economic security emerged as a growing concern through the Area needs assessment. Older adults, caregivers, and community stakeholders identified rising costs for housing, food, healthcare, utilities, insurance, and other necessities as increasing threats to financial stability, particularly for individuals living on fixed incomes.

Findings from the POLCO survey reinforced these concerns. While 58% of respondents positively rated the overall economic health of their community, only 10% rated the cost of living positively, and 35% reported experiencing financial challenges. Common concerns included meeting daily expenses, paying property taxes, affording health insurance and medications, and maintaining a healthy diet.

Public input also identified a need for benefits counseling, financial assistance programs, and employment opportunities that support economic security. Assessment findings demonstrate a continued need for services and supports that help older adults access benefits, manage rising costs, and maintain financial stability while aging in their communities.

Populations Experiencing the Greatest Unmet Need

The needs assessment identified several populations that experience disproportionate barriers to accessing services and supports. These include low-income older adults, rural and frontier residents, older adults living alone, individuals with disabilities, family caregivers, veterans, Tribal members and American Indians, individuals requiring long-term services and supports, older adults at risk of social isolation, and individuals lacking reliable transportation.

While transportation, housing, caregiver support, and Information and Assistance were consistently identified as priority needs throughout the Planning and Service Area, the specific challenges varied by location. Gallatin County participants frequently identified housing affordability and cost-of-living concerns, while residents of Jefferson, Broadwater, Meagher, and Park Counties more commonly emphasized transportation access, workforce shortages, and limited-service availability associated with rural and frontier conditions. Lewis & Clark County participants also identified increasing demand for caregiver support, aging-in-place services, and access to information and resources.

Across multiple assessment activities and data sources, these populations consistently reported higher levels of unmet need related to transportation, housing, healthcare access, caregiver support, Information and Assistance, social connection, and home and community-based services. These findings support the continued targeting of resources, outreach efforts, and service investments toward populations with the greatest economic and social need throughout the Planning and Service Area.

2.4 Evaluative Conclusions

The Area IV needs assessment identified transportation, housing, caregiver support, home and community-based services, Information and Assistance, and social isolation as the most significant unmet needs affecting older adults and family caregivers throughout the Planning and Service Area. Rural and frontier geography, workforce shortages, housing affordability challenges, and limited transportation options continue to affect access to services and support.

In addition to these priority needs, the POLCO survey identified emerging concerns related to rising living costs, property taxes, health insurance, prescription medications, oral healthcare, retirement employment opportunities, healthy food access, transportation limitations associated with no longer driving, the availability of informal support networks, and caregiver burden.

Service utilization trends, demographic projections, survey findings, public participation activities, and stakeholder feedback collectively informed the priorities, goals, service projections, and funding allocations contained within this Area Plan.

These findings directly informed the development of Goal 1 (Transportation), Goal 2 (Housing and Aging in Place), Goal 3 (Caregiver Support), Goal 4 (Information and Assistance), Goal 5 (Social Engagement), and Goal 6 (Economic Security). The assessment supports continued investment in transportation, caregiver support, Information and Assistance, benefits counseling, nutrition services, evidence-based health promotion programs, and services that promote aging in place, independence, and social connection during the 2027-2030 planning period.

Additional Planning Insight

A notable finding of Area IV needs assessment was the consistency between the POLCO survey results and local public input. Both data sources independently identified the same priority needs, reinforcing the validity of the findings and providing a strong foundation for planning and resource allocation during the 2027-2030 Area Plan period.

The most consistently identified priorities were:

1. Transportation
2. Housing and Aging in Place
3. Caregiver Support and Respite Services
4. Information and Assistance
5. Social Isolation and Community Connection
6. Economic Security

The alignment of survey findings, public comments, stakeholder feedback, and service utilization trends provides strong evidence that these areas represent the most significant needs affecting older adults and caregivers throughout Area IV and should remain priorities for future program planning, service development, and resource investment. **See Attachment 2B**.

Sources: Montana Statewide Aging Survey (POLCO/NRC), U.S. Census Bureau American Community Survey (ACS), Montana Department of Commerce Population Estimates and Projections, Area IV public comment sessions, Area IV Public Forums, Advisory Council recommendations, contractor monitoring reports, service utilization data, consumer satisfaction surveys, and stakeholder interviews.

Section 3. Public Participation and Advisory Input

3.1 Public Participation Process

Area IV Agency on Aging utilized multiple public participation methods to inform the development of the 2027-2030 Area Plan, including public forums, stakeholder meetings, Advisory Council participation, governing board review, public comment opportunities, and community engagement activities. Participants included older adults, caregivers, individuals with disabilities, service providers, community organizations, local officials, and members of the public. Input gathered through these activities was used to identify community strengths, priority needs, service gaps, and service delivery challenges throughout the Planning and Service Area.

To support the planning process, Area IV conducted four public forums between July 8 and July 26, 2026. Forums were held at local senior centers in Broadwater, Park, Lewis & Clark, and Jefferson Counties and utilized a standardized set of eight questions to gather feedback on aging services, caregiver needs, and community priorities. Flyers were posted throughout each host community to encourage participation. A total of 96 individuals participated in the forums. Copies of the forum flyers, discussion questions, and county forum summaries are included. **See Attachments 3A and 3B.**

County	Location	Date	Participants
Broadwater	Townsend	July 8, 2026	23
Park	Livingston	July 14, 2026	6
Lewis & Clark	Helena	July 15, 2026	56
Jefferson	Boulder	July 26, 2026	11
Total			**96**

While public forums were not conducted in Gallatin and Meagher Counties, input from residents was incorporated through the Montana Statewide Aging Survey (POLCO), contractor and stakeholder feedback, service utilization data, and ongoing community engagement activities.

Feedback obtained through these public participation efforts directly informed the Area IV Needs Assessment and the development of Area Plan goals, objectives, strategies, and resource allocation priorities. Consistent themes identified across public input activities included transportation, housing and aging in place, caregiver support, home and community-based services, information and assistance, social isolation, and economic security. **See Attachment 3D.**

Advisory Council Engagement

The Advisory Council reviewed Area Plan development activities during meetings held on October 15, 2026, with follow-up occurring on October 29, 2026. Council members discussed public input findings, reviewed identified needs and unmet needs, evaluated proposed goals and priorities, and provided recommendations regarding service delivery, outreach, and resource allocation.

Council feedback helped validate findings from public participation activities and informed the development of Area Plan goals, objectives, strategies, and funding priorities. Recommendations of the Advisory Council were considered during development of the final Area Plan. **See Attachment 3E.**

Tribal and Underserved Population Outreach

Although no federally recognized reservation is located within Area IV, Tribal members and other underserved populations reside throughout the Planning and Service Area. Area IV maintains ongoing communication with organizations serving American Indian residents, including the Helena Indian Alliance, and incorporates feedback from community partners, stakeholders, and public participation activities into its planning efforts. While prior Area Plans did not include direct engagement with the Helena Indian Alliance, Area IV has made intentional efforts to strengthen and improve this professional relationship through regular communication, collaboration, and outreach. Input received through these efforts helped identify service needs, barriers to access, and priority concerns affecting underserved populations and was considered in the development of Area Plan goals, priorities, and resource allocation decisions.

Public Comment Period

In accordance with Montana Area Plan requirements, the draft Area Plan was made available for public review from November 2, 2026, through December 1, 2026, providing a 30-day public comment period. Copies of the draft plan were distributed through Area IV's website, senior centers, contracted service providers, and other community distribution channels. Comments were accepted through multiple methods, including written submissions, electronic communication, and a public meeting. Feedback received during the public comment period was reviewed and incorporated into the final Area Plan, as appropriate, to ensure the plan reflected community needs, priorities, and stakeholder input. **See Attachment 3C.**

Summary

Area IV Agency on Aging utilized multiple public participation methods to inform development of the 2027-2030 Area Plan, including public forums, stakeholder meetings, Advisory Council involvement, governing board review, public comment opportunities, and ongoing community engagement activities. Four public forums were held across Broadwater, Park, Lewis & Clark, and Jefferson Counties, with a total of 96 participants, while additional input from Gallatin and Meagher Counties was obtained through the Montana Statewide Aging Survey (POLCO), contractor and stakeholder feedback, service utilization data, and other engagement efforts. Feedback from older adults, caregivers, individuals with disabilities, service providers, community organizations, and other stakeholders directly informed the Area IV Needs Assessment and the development of Area Plan goals, objectives, strategies, and resource allocation priorities. Public participation findings were highly consistent across communities and aligned closely with survey results and service data, identifying transportation, housing and aging in place, caregiver support, home and community-based services, information and assistance, social isolation, and economic security as the most significant priorities for the 2027-2030 planning period. **See Attachment 3D.**

Section 4. Goals, Objectives, and Strategies

The following goals, objectives, and strategies were developed from findings identified through the Area IV Needs Assessment, the Montana Statewide Aging Survey (POLCO), historical service utilization trends, public participation activities, demographic data, and stakeholder input. Together, they address the most significant needs affecting older adults, caregivers, and individuals with disabilities throughout the Planning and Service Area.

Progress will be monitored through service utilization data, contractor reporting, consumer satisfaction surveys, monitoring activities, Advisory Council review, and annual evaluation processes. Results will be used to assess performance, identify service gaps, guide resource allocation decisions, and support continuous quality improvement.

Baseline performance measures will be established using FY 2027 service utilization and program performance data. Progress will be evaluated annually to assess outcomes, monitor trends, and identify opportunities for improvement throughout the 2027-2030 Area Plan period.

Goal 1: Improve Transportation Access

Objective:
Increase the availability, coordination, and awareness of transportation options throughout the Planning and Service Area.

Strategies:

- Support coordination among transportation providers and community partners.
- Promote volunteer driver and community transportation programs.
- Increase awareness of available transportation resources.
- Identify and address transportation service gaps.

Performance Measures:

- Number of older adults receiving transportation services.
- Number of transportation units provided.
- Number of transportation referrals made.
- Percentage of consumers reporting transportation assisted them in accessing needed services and activities.

Needs Assessment Link:
Transportation barriers, limited public transportation options, and challenges accessing healthcare, nutrition services, and other essential services.

Goal 2: Promote Housing Stability and Aging in Place

Objective:
Increase access to housing resources, home modifications, and supportive services that support aging in place.

Strategies:

- Collaborate with local housing authorities, Human Resource Development Councils, contractors, and community partners to improve awareness of available housing resources and aging-in-place supports.
- Provide housing-related information and referrals.
- Promote home modification and repair resources.
- Strengthen partnerships addressing housing needs.
- Monitor housing-related service gaps and emerging needs.

Performance Measures:

- Number of individuals receiving housing-related information and assistance.
- Number of housing and home modification referrals.
- Number of older adults receiving housing-related supports.
- Percentage of consumers report that they are better able to remain safely and independently in their homes.

Needs Assessment Link:
Housing affordability, accessibility, home maintenance, home modifications, and aging-in-place needs.

Goal 3: Strengthen Caregiver Support and Respite Services

Objective:
Increase access to respite care, caregiver education, support services, and resource navigation.

Strategies:

- Partner with respite providers, healthcare systems, Alzheimer's Association programs, and community organizations to expand caregiver support opportunities.
- Promote caregiver support and respite services.
- Provide caregiver education and training.
- Increase awareness of dementia-related resources.
- Improve access to caregiver services in rural and frontier communities.

Performance Measures:

- Number of caregivers receiving support services.
- Number of respite units provided.
- Number of caregivers receiving education, training, or resource referrals.
- Percentage of caregivers reporting they are better able to continue providing care.

Needs Assessment Link:
Caregiver stress, respite needs, dementia support, caregiver education, and resource navigation.

Goal 4: Strengthen Information and Assistance Services

Objective:
Increased awareness of and access to aging services, benefits, and community resources.

Strategies:

- Provide Information and Assistance services.
- Expand outreach and public education efforts.
- Strengthen referral partnerships and coordination.
- Monitor information and referral trends.

Performance Measures:

- Number of individuals receiving Information and Assistance services.
- Number of Information and Assistance contacts completed.
- Number of outreach activities conducted.
- Number of referrals made to community programs and services.
- **Percentage of consumers reporting they received the information needed to access services and benefits.**

Needs Assessment Link:
Accessing, understanding, and navigating available services, benefits, and community resources.

Goal 5: Reduce Social Isolation and Strengthen Community Connections

Objective:
Increase opportunities for social engagement and community participation.

Strategies:

- Promote participation in senior centers, congregate nutrition programs, community events, volunteer opportunities, and evidence-based health promotion programs.
- Conduct targeted outreach to older adults at risk of social isolation.
- Encourage volunteerism, community engagement, and peer support opportunities.
- Strengthen partnerships that support social connection and community involvement.

Performance Measures:

- Number of participants in congregate nutrition programs.
- Number of participants in evidence-based health promotion programs.
- Number of outreach contacts to isolated or vulnerable older adults.
- Percentage of participants reporting increased social connection or community involvement.

Needs Assessment Link:
Social isolation, loneliness, and limited opportunities for community connection, particularly among older adults living alone and residents of rural and frontier communities.

Goal 6: Promote Economic Security

Objective:
Increase access to benefits, information, and resources that support financial well-being.

Strategies:

- Expand benefits counseling and outreach through SHIP, Medicare counseling, public education, and partnerships with organizations providing financial assistance and benefits enrollment support.
- Provide information, assistance, and benefits counseling to older adults and caregivers.
- Promote access to public benefits, assistance programs, and resources that support food security, healthcare access, and housing stability.
- Coordinate with community partners to connect individuals with available resources and services.

Performance Measures:

- Number of individuals receiving benefits-related assistance.
- Number of referrals to benefits and assistance programs.
- Number of outreach and education activities conducted.
- Percentage of consumers reporting increased awareness of available benefits and resources.

Needs Assessment Link:
Rising housing, food, healthcare, utility, and insurance costs; benefits access; and financial stability.

Section 5. Service Projections and Resource Targeting

5.1 Service Projection Methodology

Area IV Agency on Aging developed service projections for the 2027-2030 Area Plan using historical service utilization data, demographic trends, identified unmet needs, public input, contractor feedback, population projections, and anticipated funding levels. Recent utilization trends identified increasing demand for congregate nutrition services, caregiver support, Senior Companion services, and evidence-based health promotion programs, while transportation and homemaker services continue to represent critical community needs despite declining service utilization. Projections reflect expected demand for transportation, caregiver support, nutrition services, Information and Assistance, evidence-based programs, and home and community-based services and may be adjusted based on funding availability, service utilization, and changing community needs.

5.2 Resource Targeting

Consistent with the Older Americans Act and Montana State Plan priorities, Area IV will target resources to older adults with the greatest economic and social need, including low-income older adults, rural and frontier residents, individuals with disabilities, family caregivers, veterans, Tribal members, older adults living alone, individuals experiencing transportation barriers, and those at risk of social isolation.

Resource allocation decisions will be guided by demographic trends, service utilization data, identified service gaps, public input, and needs assessment findings. Priority investments will focus on transportation, caregiver support, nutrition services, Information and Assistance, evidence-based health promotion programs, and services that support aging in place.

5.3 Service and Funding Projections

Projected persons served, units of service, and funding allocations are included in the Area Plan budget schedules, funding allocation forms, and service projection tables. Projections will be reviewed annually and adjusted as needed to reflect funding levels, service utilization trends, and community needs.

5.4 Priority Service Investments

Based on findings from the Area IV Needs Assessment, public participation activities, and service utilization trends, Area IV will prioritize investments in transportation, Information and Assistance, congregate and home-delivered nutrition services, family caregiver support, evidence-based health promotion programs, homemaker and other supportive services, activities that reduce social isolation and promote community engagement, and Ombudsman services.

Area IV will work to maintain and strengthen access to these services through Broadwater, Gallatin, Jefferson, Lewis & Clark, Meagher, and Park Counties to address identified unmet needs and support older adults in remaining healthy, independent, and engaged in their communities.

Section 6. Service Delivery Structure and Direct Services

A current directory of contracted service providers is included in **Attachment 6A.**

6.1 Provider Procurement, Monitoring, and Accountability

Area IV Agency on Aging primarily delivers Older Americans Act services through contracts and partnerships with senior centers, community-based organizations, healthcare providers, transportation providers, and other qualified entities serving Broadwater, Gallatin, Jefferson, Lewis & Clark, Meagher, and Park Counties.

Service providers are selected through competitive procurement processes, contract renewals, performance evaluations, and provider qualification reviews. Contract awards are based on provider capacity, service quality, geographic coverage, compliance history, fiscal accountability, and the ability to meet identified community needs.

Through contracting, monitoring, technical assistance, and coordination with service providers, Area IV works to ensure services are accessible, person-centered, fiscally accountable, and responsive to the needs of older adults and caregivers. Services include nutrition, transportation, Information and Assistance, caregiver support, legal assistance, health promotion, and other Older Americans Act programs.

Area IV maintains accountability through monthly service and expenditure reporting, contractor assessments, performance monitoring, consumer feedback, and periodic program and fiscal reviews. A risk-based monitoring approach is used to identify providers requiring additional oversight, technical assistance, or corrective action. Monitoring results are used to evaluate performance, ensure compliance with contractual and program requirements, identify service gaps, and support continuous quality improvement across the service delivery network. **See Attachment 8A.**

6.2 Direct Services Provided by Area IV Agency on Aging

While most Older Americans Act services are provided through contracts, Area IV directly administers a limited number of services to address identified service gaps and unmet needs within the Planning and Service Area.

Area IV directly administers evidence-based health promotion programs, including **Stepping On** and **Tai Chi for Arthritis and Fall Prevention**. These programs support healthy aging, fall prevention, social engagement, and the ability of older adults to remain independent in their homes and communities. Programs are currently offered primarily in Lewis & Clark County, with opportunities for expansion into additional counties during the 2027-2030 planning period as resources and instructor capacity allow.

In addition, Area IV directly supports limited homemaker services to address identified service gaps, particularly in rural and frontier communities where provider capacity is limited. Homemaker services assist eligible older adults with housekeeping, household maintenance, and other non-medical supports that help individuals remain safely and independently in their homes.

These direct services are provided because they address documented unmet needs identified through the Area IV Needs Assessment and respond to limited provider capacity within portions of the Planning and Service Area. Direct service

activities support older adults with the greatest economic and social need and help individuals remain independent and age in place.

Long-Term Care Ombudsman Program

Area IV partially funds two Long-Term Care Ombudsman positions serving residents within the Planning and Service Area. Ombudsman services advocate resident rights, investigate complaints, and support quality of care and quality of life within long-term care facilities. **See Attachments 6C and 6D.**

Section 7. Nutrition Services

Nutrition services remain a vital component of the Older Americans Act service system in Area IV. Congregate and home-delivered meal programs support health, independence, food security, social engagement, and the ability of older adults to remain in their homes and communities.

Area IV funds nutrition providers serving Broadwater, Gallatin, Jefferson, Lewis & Clark, Meagher, and Park Counties. Congregate meals are offered through senior centers and community dining sites, while home-delivered meals are available to eligible older adults who are unable to adequately access congregate nutrition opportunities or prepare meals independently.

Demand for nutrition services remains strong and is expected to increase as the older adult population grows. Area IV currently maintains no waiting lists for congregate or home-delivered meals. However, providers continue to face challenges related to serving rural and frontier communities, including long travel distances, severe weather, workforce and volunteer shortages, transportation barriers, and rising operating costs.

Nutrition services are especially important for older adults with the greatest economic and social need, including low-income individuals, rural residents, people with disabilities, family caregivers, veterans, Tribal members, and those at risk of social isolation.

Area IV works with nutrition providers to monitor participation, meal quality, food safety, service accessibility, and emerging community needs. Providers utilize nutrition screening and assessment tools in accordance with state and federal requirements to identify nutritional risk and support appropriate service delivery.

During the 2027-2030 planning period, Area IV will continue to support high-quality nutrition services, reduce barriers to access, promote social engagement, and respond to changing community needs throughout the region.

Nutrition Service Availability

Area IV supports congregate and home-delivered nutrition services throughout Broadwater, Gallatin, Jefferson, Lewis & Clark, Meagher, and Park Counties. Congregate meals are provided through senior centers and community dining sites, while home-delivered meals are available are available to eligible older adults who are unable to adequately access congregate nutrition opportunities or prepare meals independently.

County	Site	Site Days Open	Congregate Meals	Home Delivered Meals
Broadwater	Townsend	5 days	Yes	Yes
Gallatin	Bozeman	5 days	Yes	Yes
	Belgrade	5 days	Yes	Yes
	Manhattan	3 days	Yes	Yes
	Three Forks	3 days	Yes	Yes
	West Yellowstone	2 days	Yes	Yes
Jefferson	Boulder	3 days	Yes	Yes
	Whitehall	5 days	Yes	Yes
Lewis & Clark	Augusta	5 days	Yes	Yes
	Helena	5 days	Yes	Yes
	Helena Indian Alliance	5 days	Yes	Yes
	Lincoln	5 days	Yes	Yes
Meagher	White Sulphur Springs	5 days	Yes	Yes
Park	Livingston	5 days	Yes	Yes

Note: Home-delivered meal availability may vary based on participant eligibility, service area coverage, weather conditions, and provider capacity. Area IV works with nutrition providers to maintain access to nutrition services throughout the Planning and Service Area and to address emerging needs in rural and frontier communities.

Section 8. Quality Management and Continuous Improvement

8.1 Performance Measurement and Data Collection

Area IV Agency on Aging utilizes a performance measurement system to evaluate service delivery, outcomes, fiscal accountability, and progress toward Area Plan goals. Data are collected and reported in accordance with requirements established by the Montana Aging Services Bureau and the Administration for Community Living. Contractors submit monthly service and expenditure reports, Capstone data, and other required performance information.

Performance data reviewed include:

- Individuals served
- Units of service delivered.
- Program expenditure
- Demographic characteristics
- Consumer satisfaction and outcomes
- Contractor performance data
- Public input and needs assessment findings.

This information is used to monitor service utilization, assess program effectiveness, identify service gaps, support planning activities, and guide resource allocation decisions.

8.2 Fiscal Oversight, Monitoring, and Contractor Accountability

Area IV maintains fiscal and programmatic oversight to ensure compliance with federal and state requirements and responsible stewardship of public resources. Contractors submit monthly expenditure reports, which are reviewed for allowability, documentation, budget compliance, and fiscal accountability.

Area IV utilizes a risk-based monitoring framework that considers funding levels, program complexity, prior monitoring results, fiscal performance, staffing changes, complaint history, and other identified risks when establishing monitoring priorities and schedules. Contractor performance is evaluated through expenditure reviews, performance reports, assessment tools, technical assistance, and monitoring activities.

During the 2027-2030 planning period, monitoring activities will include program reviews, fiscal reviews, documentation reviews, performance measurement, consumer feedback reviews, compliance monitoring, and corrective action follow-up. Monitoring and accountability activities are coordinated with Area IV's Quality Management and Continuous Quality Improvement processes. When concerns are identified, Area IV provides technical assistance and works collaboratively with providers to implement corrective actions and improve program performance. S**ee Attachment 8A.**

8.3 Consumer Satisfaction and Continuous Quality Improvement

Area IV utilizes a Customer Satisfaction and Outcomes Survey to gather feedback regarding service quality, accessibility, and outcomes. Survey findings, contractor assessments, monitoring results, service utilization data, fiscal reports, public input, and community partner feedback are reviewed regularly to support continuous quality improvement.

This information is used to identify emerging needs, improve service quality, strengthen contractor performance, and ensure services remain responsive to older adults, caregivers, and individuals with disabilities throughout the Planning and Service Area**. See Attachment 8B.**

8.4 Training, Technical Assistance, and Organizational Development

Area IV provides training and technical assistance to contractors, volunteers, Advisory Council members, and community partners throughout the year. Training and support are provided during orientation, contract implementation, monitoring activities, and as needed to address identified performance, program or compliance concerns.

Training and technical assistance may address Older Americans Act requirements, financial management, reporting, confidentiality, person-centered service delivery, outreach, quality improvement, and recordkeeping. Support is provided through workshops, webinars, technical assistance meetings, written guidance, and individual consultation. Monitoring and performance data are used to identify training priorities and support continuous improvement. **See Attachment 8C.**

Section 9 Assurances

Assurances, Certification, and Approval

Area IV Agency on Aging assures that all programs and services funded under the Older Americans Act will be administered in accordance with applicable federal and state laws, regulations, policies, and guidance governing Area Agencies on Aging.

Area IV further assures that:

1. Services will be provided without discrimination and in compliance with all applicable federal and state civil rights requirements.
2. Priority will be given to older adults with the greatest economic and social need, including low-income individuals, rural and frontier residents, individuals with disabilities, family caregivers, veterans, Tribal members, and other vulnerable populations consistent with the Older Americans Act.
3. Services will be delivered in a manner that promotes consumer choice, dignity, independence, self-determination, and person-centered planning.
4. Information and Assistance services will be available to assist older adults, caregivers, and individuals with disabilities in accessing available services, benefits, and community resources.
5. Federal, state, and local funds will be managed in accordance with applicable fiscal requirements and sound accounting practices, and appropriate financial controls will be maintained to ensure fiscal accountability and stewardship of public resources.
6. Contracted providers will be monitored through fiscal oversight, performance review, program monitoring, technical assistance, and corrective action processes to ensure compliance with program and contractual requirements.
7. Older adults, caregivers, service providers, community organizations, and other stakeholders will have opportunities to participate in planning, evaluation, advocacy, and public participation activities.
8. Emergency preparedness and continuity planning considerations will be incorporated into service delivery and coordination activities to support older adults and caregivers before, during, and after emergency events.
9. A quality management and continuous improvement process will be utilized to evaluate service quality, monitor outcomes, identify unmet needs, and support ongoing program improvement.
10. Area IV will advocate on behalf of older adults and caregivers and work collaboratively with community partners, public agencies, healthcare providers, and service organizations to improve access to services and supports.
11. Confidential information and personally identifiable information will be protected in accordance with applicable federal and state privacy requirements and agency policies.
12. The goals, objectives, and strategies contained within the 2027-2030 Area Plan will be implemented to the extent permitted by available funding and resources and will be reviewed periodically to respond to changing community needs and priorities.

Certification

I hereby certify that the information contained in the Area IV Agency on Aging 2027-2030 Area Plan is accurate to the best of my knowledge and that Area IV Agency on Aging will administer Older Americans Act programs and services in accordance with applicable federal and state laws, regulations, policies, and requirements.

John Gorton
Area IV Program Director
Area IV Agency on Aging
Rocky Mountain Development Council
Date: _____

Advisory Council Review

The Area IV Advisory Council reviewed the 2027-2030 Area Plan and provided recommendations during the planning process. Advisory Council input was considered in the development of the final Area Plan.

Advisory Council Chair
Date: _____

Governing Board Approval

The Rocky Mountain Development Council Board of Directors reviewed and approved the Area IV Agency on Aging 2027-2030 Area Plan.

Board Chair
Rocky Mountain Development Council
Date: _____

Agency Acceptance

Rocky Mountain Development Council, acting as the designated Area Agency on Aging for Area IV, accepts responsibility for implementation of this Area Plan and agrees to conduct ongoing monitoring, evaluation, and reporting activities consistent with federal and state requirements.

Authorized Representative
Rocky Mountain Development Council
Date: _____

State Approval

Approved by the Montana Department of Public Health and Human Services, Aging Services Bureau.

Authorized Representative
Montana Department of Public Health and Human Services
Aging Services Bureau
Date: _____

Attachment 1A Governing Board Roster

GOVERNING BOARD MEMBERS:

BROADWATER COUNTY Commissioner Debi Randolph	**LEWIS & CLARK COUNTY** Commissioner Andy Hunthausen
GALLATIN COUNTY Commissioner Zach Brown	**MEAGHER COUNTY** Commissioner Clive Townsend
JEFFERSON COUNTY Commissioner Craig Doolittle	**PARK COUNTY** Commissioner Michael Story
Nutrition Site Rep Sandra Chamberlain	

Attachment 1B Advisory Council Roster

BROADWATER COUNTY Vic Sample	**PARK COUNTY** Nancy Adkins
GALLATIN COUNTY Linda Gabel	**HEALTH CARE/VOLUNTEER SECTOR** Tanya Douglas
JEFFERSON COUNTY Wanda Levengood	**VETERANS ADMINISTRATION REP.** Christina Parker Montana VA Health Care System VAMC Fort Harrison
LEWIS & CLARK COUNTY Mike Murray	**NATIVE AMERICAN REPRESENTATIVE** Carol McMaster
MEAGHER COUNTY Rosie Greener	

Attachment 2A: County Demographic Profiles

The following county demographic profiles summarize key demographic characteristics and priority populations within the Area IV Planning and Service Area. Data from the U.S. Census Bureau Population Estimates Program and American Community Survey are used to inform planning, resource allocation, outreach, and service targeting, with particular focus on older adults with low incomes, disabilities, caregiving responsibilities, veteran status, and those living alone who may be at greater risk of isolation and unmet service needs.

Population estimates are derived from the U.S. Census Bureau Population Estimates Program (PEP), American Community Survey (ACS), Montana Department of Commerce population resources, and other publicly available planning datasets. Veteran, disability, living-alone, and limited English proficiency estimates are reported for individuals age 65 and older where age 60+ estimates are unavailable. Alzheimer's Disease and Related Disorders estimates are based on county prevalence estimates and should be considered planning estimates. Data are intended to support planning, outreach, resource allocation, and service targeting activities.

Broadwater County Population Summary (2026)

Population Type by County	Total # in County /PSA	% Of County / PSA Population
Total County Population	8,302	100%
Total County Population 60+	2,639	32.4%
African American 60+	10	0.12%
American Indian 60+	38	0.46%
Asian 60+	10	0.12%
Hispanic/ Latino 60+	44	0.53%
Poverty (low-income) 60+	244	2.93%
Poverty (low-income) Minority 60+	17	0.20%
Limited English proficiency 65+	9	0.11%
Individuals Residing in Rural Areas/ Isolated 60+	2,639	32.4%
Individuals with Alzheimer’s Disease and Related Disorders 65+	465	5.6%
Individuals Living Alone 65+	361	4.35%
Grandparents Raising Grandchildren/Kinship Caregivers 60+	49	0.59%
Individuals with Disabilities 65+	807	9.72%
Veterans 65+	411	4.95%
Individuals at Risk for Institutional Placement 65+	807	9.72%

Gallatin County Population Summary (2026)

Population Type by County	Total # in County /PSA	% Of County / PSA Population
Total County Population	126,984	100%
Total County Population 60+	24,440	19.24%
African American 60+	42	0.03%
American Indian 60+	135	0.11%
Asian 60+	202	0.16%
Hispanic/ Latino 60+	586	0.46%
Poverty (low-income) 60+	1,492	1.17%
Poverty (low-income) Minority 60+	74	0.06%
Limited English proficiency 65+	554	0.44%
Individuals Residing in Rural Areas/ Isolated 60+	16,061	12.65%
Individuals with Alzheimer's Disease and Related Disorders 65+	7,746	6.1%
Individuals Living Alone 65+	4,060	3.20%
Grandparents Raising Grandchildren/Kinship Caregivers 60+	99	0.08%
Individuals with Disabilities 65+	4,761	3.75%
Veterans 65+	2,392	1.88%
Individuals at Risk for Institutional Placement 65+	4,761	3.75%

Jefferson County Population Summary (2026)

Population Type by County	Total # in County /PSA	% Of County / PSA Population
Total County Population	13,304	100%
Total County Population 60+	4,299	32.31%
African American 60+	18	0.14%
American Indian 60+	59	0.44%
Asian 60+	31	0.23%
Hispanic/ Latino 60+	69	0.52%
Poverty (low-income) 60+	220	1.65%
Poverty (low-income) Minority 60+	30	0.23
Limited English proficiency 65+	75	0.56%
Individuals Residing in Rural Areas/ Isolated 60+	4,299	32.31%
Individuals with Alzheimer's Disease and Related Disorders 65+	865	6.5%
Individuals Living Alone 65+	520	3.91%
Grandparents Raising Grandchildren/Kinship Caregivers 60+	59	0.44%
Individuals with Disabilities 65+	1,011	7.60%
Veterans 65+	415	3.12%
Individuals at Risk for Institutional Placement 65+	1,011	7.60%

Lewis & Clark County Population Summary (2026)

Population Type by County	Total # in County /PSA	% Of County / PSA Population
Total County Population	75,129	100%
Total County Population 60+	21,414	28.50%
African American 60+	59	0.08%
American Indian 60+	334	0.44%
Asian 60+	121	0.16%
Hispanic/ Latino 60+	336	0.45%
Poverty (low-income) 60+	1,856	2.47%
Poverty (low-income) Minority 60+	52	0.07%
Limited English proficiency 65+	332	0.44%
Individuals Residing in Rural Areas/ Isolated 60+	11,720	15.60%
Individuals with Alzheimer's Disease and Related Disorders 65+	5,184	6.9%
Individuals Living Alone 65+	4,502	5.99%
Grandparents Raising Grandchildren/Kinship Caregivers 60+	125	0.17%
Individuals with Disabilities 65+	4,517	6.01%
Veterans 65+	2,386	3.18%
Individuals at Risk for Institutional Placement 65+	4,517	6.01%

Meagher County Population Summary (2026)

Population Type by County	Total # in County /PSA	% Of County / PSA Population
Total County Population	2,065	100%
Total County Population 60+	870	42.13%
African American 60+	0	0
American Indian 60+	7	0.33%
Asian 60+	0	0
Hispanic/ Latino 60+	7	0.33%
Poverty (low-income) 60+	195	9.44%
Poverty (low-income) Minority 60+	0	0
Limited English proficiency 65+	24	1.16%
Individuals Residing in Rural Areas/ Isolated 60+	870	42.13%
Individuals with Alzheimer's Disease and Related Disorders 65+	83	4.0%
Individuals Living Alone 65+	168	8.14%
Grandparents Raising Grandchildren/Kinship Caregivers 60+	0	0
Individuals with Disabilities 65+	260	12.59%
Veterans 65+	168	8.14%
Individuals at Risk for Institutional Placement 65+	260	12.59%

Park County Population Summary (2026)

Population Type by County	Total # in County /PSA	% Of County / PSA Population
Total County Population	18,074	100%
Total County Population 60+	6,018	33.30%
African American 60+	11	0.06%
American Indian 60+	70	0.39%
Asian 60+	25	0.13%
Hispanic/ Latino 60+	110	0.61%
Poverty (low-income) 60+	590	3.26%
Poverty (low-income) Minority 60+	56	0.31%
Limited English proficiency 65+	160	0.89%
Individuals Residing in Rural Areas/ Isolated 60+	6,018	33.30%
Individuals with Alzheimer's Disease and Related Disorders 65+	1,103	6.1%
Individuals Living Alone 65+	1,146	6.34%
Grandparents Raising Grandchildren/Kinship Caregivers 60+	25	0.14%
Individuals with Disabilities 65+	991	5.20%
Veterans 65+	759	4.20%
Individuals at Risk for Institutional Placement 65+	991	5.20%

Attachment 2B Area IV Summary of Key Findings from POLCO Survey

Executive Summary

Area IV Agency on Aging serves Broadwater, Gallatin, Jefferson, Lewis & Clark, Meagher, and Park Counties in southwest and west-central Montana. The Planning and Service Area includes the regional centers of Helena and Bozeman, as well as extensive rural and frontier communities where long travel distances, workforce shortages, transportation barriers, housing affordability concerns, and limited access to services affect the ability of many older adults to remain independent and age in place. The region's older adult population continues to grow and now represents nearly one-quarter of the total population, increasing demand for ageing services and support.

To inform the 2027-2030 Area Plan, Area IV conducted a comprehensive needs assessment utilizing demographic data, service utilization trends, contractor feedback, customer satisfaction data, stakeholder interviews, public forums, Advisory Council input, and findings from the State of Montana 2026 Community Assessment Survey for Older Adults conducted by Polco and the National Research Center. The survey included 984 respondents residing within Area IV and provided statistically valid information regarding community livability, service needs, and quality of life among older adults.

Assessment findings consistently identified six priority areas affecting older adults and caregivers throughout the Planning and Service Area:

1. Transportation
2. Housing and Aging in Place
3. Caregiver Support and Respite Services
4. Information and Assistance
5. Social Isolation and Community Connections
6. Economic Security

These priorities were consistently reflected across survey findings, public forums, stakeholder feedback, contractor input, and service utilization data.

The assessment found that transportation remains the most significant unmet need affecting older adults throughout Area IV. While many respondents reported positive experiences with personal transportation and driving, access to public transportation and transportation alternatives remains limited, particularly in rural and frontier communities. Transportation barriers affect access to healthcare, nutrition services, shopping, social engagement opportunities, and other essential services.

Housing and aging in place also emerged as critical concerns. Older adults reported significant challenges related to housing affordability, home maintenance, accessibility, home repairs, and the availability of housing options that support independent living. Demand for home modifications, supportive services, and housing-related assistance continues to exceed available resources.

Caregiver support needs were substantial throughout the region. Family caregivers identified respite care, dementia education, caregiver training, emotional support, and resource navigation as critical needs. Increasing caregiver stress and limited access to respite services, particularly in rural communities, were consistently identified as significant concerns.

The assessment also identified ongoing challenges related to accessing information, benefits, and community resources. Older adults and caregivers frequently reported difficulty identifying and navigating available services, highlighting the importance of Information and Assistance services, outreach, and resource coordination.

Social isolation and community connection emerged as additional priorities. Survey respondents and public forum participants identified loneliness, limited opportunities for social engagement, and concerns regarding mental well-being as issues affecting quality of life, particularly among older adults living alone and residents of rural and frontier communities.

Economic security concerns have increased in recent years as older adults face rising costs associated with housing, food, healthcare, insurance, utilities, and medications. Many respondents reported concerns about maintaining financial stability while living on fixed incomes and identified benefits counseling, financial assistance programs, and resource navigation as important supports.

The needs assessment further identified populations with the greatest economic and social need as low-income older adults, rural and frontier residents, individuals with disabilities, family caregivers, veterans, Tribal members, older adults living alone, individuals requiring long-term services and supports, and those lacking reliable transportation. These populations consistently reported higher levels of unmet need across multiple assessment activities and data sources.

The strong alignment between community survey findings, public participation activities, stakeholder input, and service utilization data provides a clear and defensible foundation for the Area IV 2027-2030 Area Plan. The resulting goals, objectives, and resource allocation priorities are designed to address identified needs, strengthen access to critical services, support aging in place, and improve the health, independence, and quality of life of older adults and caregivers throughout the Planning and Service Area.

Attachment 2C – Service Utilization Trends (FY2024-FY2026) Units/Client

Service	FY2024	FY2025	FY2026	Trend
Congregate Meals	55676/2535	63489/2702	65883/2658	Increasing
Home Delivered Meals	144383/1249	138011/1212	129819/1038	Declining
Transportation	24146/499	23648/474	21371/467	Declining
Homemaker	5532/95	4142/84	4041/78	Declining
Caregiver Services	1061/20	1048/19	1232/16	Increasing
Senior Companion	7412/175	9744/208	11424/268	Increasing
Evidence-Based Programs	5664/271	NA	NA	Discontinued
Information & Assistance	NA	2	5	New Category

Service Utilization Trends Summary

Analysis of FY2024-FY2026 service utilization data identified increasing participation in congregate nutrition programs, caregiver support services, Senior Companion services, and evidence-based health promotion programs, reflecting growing demand for social engagement, wellness activities, caregiver assistance, and aging-in-place supports.

At the same time, utilization of transportation, homemaker, and home-delivered nutrition services declined, even though these services were consistently identified as priority needs through public input, stakeholder feedback, and survey findings. This suggests that workforce shortages, limited provider capacity, geographic barriers, and funding constraints may be affecting access to services, particularly in rural and frontier communities.

Overall, service utilization trends reinforce the importance of transportation, caregiver support, Information and Assistance, nutrition services, social engagement opportunities, and home and community-based services as priorities for the 2027-2030 planning period.

BROADWATER COUNTY:
AGENCY ON AGING
PUBLIC COMMENT

ROCKY
Agency on Aging
dignity, choice, and engagement

Your voice shapes services and supports for older adults in our community.



WHERE: Townsend Senior Center

WHEN: Wednesday, July 8 @ 11:30 AM

WHO SHOULD ATTEND? Adults 60+ Caregivers Community Providers

WE WANT YOUR INPUT ON THESE 8 QUESTIONS:

1. What makes your community a good place for older adults to live and age?
2. What are the three biggest concerns facing:
   - Older adults?
   - Family members caring for aging loved ones?
3. What services or supports help older adults stay in their homes and communities as they age? What services would be most helpful for family caregivers? Are there any services you think the Agency on Aging should offer?
4. What are the best ways to reach older adults and family caregivers who may need information, support, or services?
5. What kinds of support do caregivers of people with dementia or Alzheimer's disease need most?
6. What challenges do older adults who live alone face, especially those living with dementia?
7. In addition to providing services, how can the Agency on Aging help educate the community about aging issues and advocate for policies that support healthy aging?
8. Is there anything else you would like to share? Stories, examples, and personal observations are welcome.

YOUR INPUT MAKES A DIFFERENCE!

TOGETHER, WE CAN BUILD *a better future for aging well.*

QUESTIONS? CONTACT: John Gorton 406.457.7359 jgorton@RMDC.net

Thank you for sharing your voice and helping shape the future of aging in Broadwater County.

PARK COUNTY:
AGENCY ON AGING
PUBLIC COMMENT

ROCKY
Agency on Aging
dignity, choice, and engagement

Your voice shapes services and supports for older adults in our community.



WHERE:
Park County
Senior Center

WHEN:
Tuesday,
July 14
@ 11:30 AM

WHO SHOULD ATTEND?
Adults 60+
Caregivers
Community Providers

WE WANT YOUR INPUT ON THESE 8 QUESTIONS:

1. What makes your community a good place for older adults to live and age?
2. What are the three biggest concerns facing:
   - Older adults?
   - Family members caring for aging loved ones?
3. What services or supports help older adults stay in their homes and communities as they age? What services would be most helpful for family caregivers? Are there any services you think the Agency on Aging should offer?
4. What are the best ways to reach older adults and family caregivers who may need information, support, or services?
5. What kinds of support do caregivers of people with dementia or Alzheimer's disease need most?
6. What challenges do older adults who live alone face, especially those living with dementia?
7. In addition to providing services, how can the Agency on Aging help educate the community about aging issues and advocate for policies that support healthy aging?
8. Is there anything else you would like to share? Stories, examples, and personal observations are welcome.

YOUR INPUT MAKES A DIFFERENCE!

TOGETHER, WE CAN BUILD *a better future for aging well.*

QUESTIONS? CONTACT: John Gorton 406.457.7359 jgorton@RMDC.net

Thank you for sharing your voice and helping shape the future of aging in Park County.

LEWIS AND CLARK COUNTY:
AGENCY ON AGING
PUBLIC COMMENT

ROCKY
Agency on Aging
dignity, choice, and engagement



Your voice shapes services and supports for older adults in our community.

WHERE:
Rocky Neighborhood Center

WHEN:
Wednesday, July 15
@ 11:30 AM

WHO SHOULD ATTEND?
Adults 60+
Caregivers
Community Providers

WE WANT YOUR INPUT ON THESE 8 QUESTIONS:

1. What makes your community a good place for older adults to live and age?
2. What are the three biggest concerns facing:
   - Older adults?
   - Family members caring for aging loved ones?
3. What services or supports help older adults stay in their homes and communities as they age? What services would be most helpful for family caregivers? Are there any services you think the Agency on Aging should offer?
4. What are the best ways to reach older adults and family caregivers who may need information, support, or services?
5. What kinds of support do caregivers of people with dementia or Alzheimer's disease need most?
6. What challenges do older adults who live alone face, especially those living with dementia?
7. In addition to providing services, how can the Agency on Aging help educate the community about aging issues and advocate for policies that support healthy aging?
8. Is there anything else you would like to share? Stories, examples, and personal observations are welcome.

YOUR INPUT MAKES A DIFFERENCE!

TOGETHER, WE CAN BUILD *a better future for aging well.*

QUESTIONS? CONTACT: John Gorton | 406.457.7359 | jgorton@RMDC.net

Thank you for sharing your voice and helping shape the future of aging in Lewis and Clark County.

JEFFERSON COUNTY:
AGENCY ON AGING
PUBLIC COMMENT

ROCKY
Agency on Aging
dignity, choice, and engagement

Your voice shapes services and supports for older adults in our community.



WHERE:
Boulder Basin Senior Center

WHEN:
Thursday, July 23
@ 11:30 AM

WHO SHOULD ATTEND?
Adults 60+
Caregivers
Community Providers

WE WANT YOUR INPUT ON THESE 8 QUESTIONS:

1. What makes your community a good place for older adults to live and age?
2. What are the three biggest concerns facing:
   - Older adults?
   - Family members caring for aging loved ones?
3. What services or supports help older adults stay in their homes and communities as they age? What services would be most helpful for family caregivers? Are there any services you think the Agency on Aging should offer?
4. What are the best ways to reach older adults and family caregivers who may need information, support, or services?
5. What kinds of support do caregivers of people with dementia or Alzheimer's disease need most?
6. What challenges do older adults who live alone face, especially those living with dementia?
7. In addition to providing services, how can the Agency on Aging help educate the community about aging issues and advocate for policies that support healthy aging?
8. Is there anything else you would like to share? Stories, examples, and personal observations are welcome.

YOUR INPUT MAKES A DIFFERENCE!

TOGETHER, WE CAN BUILD *a better future for aging well.*

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Thank you for sharing your voice and helping shape the future of aging in Jefferson County.

Attachment 3C Public Comment Results

Broadwater

1) **Q- What makes your community a good place for older adults to live and age?**
   - Local Hospital, grocery/drug/senior center, flower shop; community supports schools;

2) **Q-What are the three biggest concerns facing: Older adults/family members caring for aging loved one?**
   - Taxes, insurance costs; where are the caregivers (professional), more volunteer caregivers, respite,

3) **Q- What services or supports help older adults stay in their home and communities as they age? What services would be most helpful for family caregivers? Are there services you the AOA should offer?**
   - Transportation for Dr's appts; handyman service; Respite; wider radius for MOW (people to deliver)

4) **Q- What are the best ways to reach older adults and family caregivers who may need info, support, etc.**
   - Newspaper, friends, church, senior center, phone, mailings, bulletin boards, tv, radio, social media

5) **Q- What kinds of support do caregivers of people w/dementia need most?**
   - Respite, training,
6) **Q- What challenges do those living alone face?**
   - Emergencies, how long until found; someone with dementia shouldn't be living alone; caregivers age and ability.

7) **Q- How can AoA help educate the community about aging issues and advocate for policies supporting healthy aging?**
   - Programs in Townsend not going to Helena; law enforcement presentations; EMT presentations; DVD loan on various learning programs.

8) **Q- Is there anything else you would like to share?**
   - Is there a list for Broadwater co for home health/ cleaning; 3 forks has school kids assist seniors with yard work, etc. utilize the school district; transpiration; Public Health is a good contact for homemaker, etc.; Mindy. No desert?

Park

1. **Q- What makes your community a good place for older adults to live and age?**
    - The size of Livingston, being a smaller community, is a benefit.
2. **Q- What are the three biggest concerns facing older adults and family members who care for loved ones?**
    - Burn out.
    - Lack of support and mental support
    - Technology can be a hindrance and a help
3. **Q- What services or supports help older adults stay in their homes and communities…**
    - Have a Resource Specialist at the senior center once a month for assistance.
    - Unable to find agencies.
    - Awareness of what is available.
    - Respite Care
4. **Q- What are the best ways to reach older adults…**
    - Ads in the paper
    - Directory of local services available
    - Hotlines
5. **Q- What kind of supports to Caregivers of people with dementia and Alzheimer's…**
    - Respite Care- even for a couple of hours.
    - Help
    - Technology supports.
6. **Q- What challenges do older adults who live alone face…**
    - Safety net, someone checking in on them.
    - Remembering something on the stove
    - Lack of sight and hearing
    - Ability to go shopping.
    - Jitterbug – assisted phones.
7. **Q- How can the Agency on Aging educate the community…**
    - Educate the kids at high schools- kids care about their grandparents.

8. **Q- Anything else…**
    - Communication – make sure seniors have access to the Agency on Aging.
    - Help with photo identification.
    - Transportation from Livingston to Bozeman

Lewis and Clark

1) **Q- What makes this a good community for seniors?**
   - Senior center
   - City transit
   - Hospital services
   - Parks
   - Walkable

2) **Q- Biggest concerns?**
   - Mobility
   - Companions
   - Respite
   - Politics
   - Social security
   - Transportation (both in-town and out-of-town)
   - Living alone
   - Food costs
   - Medicaid

3) **Q- What helps older adults stay in their home? Helps caregivers? Services?**
   - Transportation
   - MOW
   - In-home cooking and cleaning
   - Training for service providers

4) **Q- Best ways to outreach?**
   - Use media
   - Podcasts

5) **Q-What supports do caregivers need in caring for dementia/Alzheimer's?**
   - Respite/break
   - Visiting healthcare
   - Getting the word out
   - Working with local healthcare professionals
   - Knowing/sharing resources

6) **Q- Challenges – especially living alone or living with dementia?**
   - Falling
   - Isolation
   - Landscaping
   - Environment (ex: lighting)
   - Safety/security
   - Door-to-door solicitors
   - Healthcare system

7) **Q- How can AAA help educate regarding issues and advocate for policies to support healthy aging?**
   - Come to seniors
   - AARP (John on the board)
   - Get local legislators involved.
   - Provide a phone number for information.
   - Local news coverage
   - Train caregivers in nursing homes

8) **Q-Anything else, Share stories**
   - Concerns with scams
   - Belief that isolation is one's own fault.
   - Need to be in contact and connect with each other (ex: news of fall and person lay there for 8 days before discovered).
   - Need check ins.
   - Med locker for DME

Jefferson

1) **Q- What makes your community a good place for older adults to live and age?**
    - Boulder is highly walkable with most businesses and services on the main street.
    - People are friendly.
    - Whitehall Transport helps them get to services that are out of town.
    - The library hosts several events.
    - The church communities do a lot for the people of Boulder.
2) **Q-What are the three biggest concerns facing: older adults; family members caring for aging loved ones?**
    - Lack of **TRANSPORTATION** options is a huge concern for Boulder residents.
    - **There seems to be a lack of providers for domestic tasks like housekeeping and yard work.**
    - There are few if any options for Respite in Boulder
3) **Q- What services or supports help older adults stay in their homes and communities as the age? What services would be most helpful for family caregivers? Are there any services you think the Agency on Aging should offer?**
    - **Providers to assist with non-medical home care and in-home healthcare.**
    - A telephone check-in service could help combat isolation.
    - More education and assistance with fraud and scams
4) **Q-What are the best ways to reach older adults and family caregivers who may need information, support, or services?**
    - The senior center is underutilized as a resource and communication hub.
    - More advertising at the post office, library, and local businesses could help.
5) **Q- What kinds of support do caregivers of people with dementia or ALZ need most?**
    - **RESPITE-** There is a lack of reliable respite providers in the area.
6) **Q- What challenges do older adults who live alone face, especially those living with dementia?**
    - **ISOLATION-** Seniors could use an individual or organization to check in on them regularly.
    - **Lack of home health providers**
7) **Q- In addition to providing services, how can the AA help educate the community about aging issues and advocate for policies that support healthy aging?**
    - Increasing the conversations surrounding the struggles of our seniors
8) **Q-Is there anything else you would like to share?**
    - Connie Grenz was identified as a “pillar of the community” because she takes it on herself to check in on and assists seniors in the Boulder community. She has been acting alone and in an entirely volunteer capacity. Connie may be a good resource to help bring services to Boulder.
    - The Jefferson County Sherrif Department and their deputies are in the community helping senior regularly. They were also identified as a good resource for improving services in the boulder community.

Attachment 3D Public Comment Summary

Public Comment Summary on Aging Services (2026)

A Regional Analysis of Broadwater, Park, Lewis & Clark, and Jefferson Counties
Date: July 24, 2026

This report summarizes qualitative public input collected from four counties in Montana: Broadwater, Park, Lewis & Clark, and Jefferson. The purpose of the analysis is to identify common themes related to aging, caregiving, and service needs. Data was organized by county and analyzed thematically. Across all counties, **the most frequently cited issues include transportation limitations, caregiver burnout, social isolation, and insufficient access to in-home and respite services**. Respondents also emphasized the importance of local community assets and need for **improved awareness of existing resources**. Findings suggest that while communities possess strong informal support systems, **significant gaps remain in formal service provision and coordination**. Recommendations include expanding transportation options, increasing respite care availability, enhancing resource navigation, and strengthening community-based outreach strategies.

The aging population in rural and semi-rural communities faces increasing challenges related to accessibility, social support, and service availability. Local public input provides critical insight into lived experiences and identifies gaps in existing systems. This report synthesizes responses from structured community discussions across four counties to inform planning efforts and service development.
The guiding questions addressed:

- Community strengths for older adults
- Primary concerns affecting older adults and caregivers.
- Needed services and support.
- Effective outreach strategies
- Caregiver needs, particularly related to dementia and Alzheimer's disease
- Challenges faced by older adults, especially those living alone.
- Strategies for education and advocacy

Public comments were collected and organized by county. Responses were reviewed and coded into the following thematic categories:

- Community strengths
- Key concerns
- Services and supports.
- Outreach and communication
- Caregiver needs
- Living alone challenges
- Education and advocacy
- Additional observations

A qualitative thematic analysis approach was used to identify recurring patterns across counties. Data were not weighted; instead, themes were identified based on frequency and emphasis in participant responses.

Community Strengths

Participants identified several consistent strengths across counties, including:

- Walkable town layouts and proximity to services (Jefferson, Park)
- Availability of senior centers, hospitals, and transit systems (Broadwater, Lewis & Clark)
- Strong community cohesion, including churches, libraries, and informal networks.
- Familiarity among residents in smaller communities

These strengths contribute to older adults' ability to remain in their communities; however, they do not fully mitigate gaps in services.

The most prominent concerns included:

- **Transportation barriers** for medical and daily needs
- **Caregiver burnout** and shortages of professional caregivers
- **Financial pressures**, including taxes, insurance, food costs, and public benefits.
- **Social isolation** and lack of regular contact
- **Limited availability of in-home services** and respite care

Transportation and respite care were the most consistently reported needs across all counties.

Participants highlighted several critical service gaps:

- Expanded transportation services, including rural and out-of-town access.
- Respite care for caregivers (short-term and ongoing)
- In-home support services (housekeeping, meal preparation, personal care)
- Increased access to home health providers
- Improved resource navigation and service directories

Additional suggestions included telephone check-in programs and leveraging youth or volunteer networks.

Effective outreach methods identified by participants included:

- Traditional media (newspapers, radio, television)
- Community-based locations (senior centers, libraries, post offices)
- Direct communication (phone calls, mailings, hotlines)
- Informal networks (churches, friends)
- Digital platforms (social media, podcasts)

A multimodal strategy is necessary to reach all older adult populations effectively.

Caregivers expressed a need for:

- Respite care services.
- Training and education for caregiving roles
- Access to visiting health professionals
- Greater awareness of available resources

Across counties, respite care emerged as the most critical and underserved need.

Key challenges included:

- Lack of safety monitoring and emergency response support
- Risks of falls and delayed discovery
- Difficulty completing daily tasks.
- Sensory impairments (hearing, vision)
- Vulnerability to scams and exploitation

Isolation was identified as both a social and safety concern.

Participants recommended:

- Community education efforts involving schools, healthcare providers, and public safety agencies.
- Engagement with local policymakers and organizations
- Increased awareness campaigns on scams, services, and aging issues
- Integration of aging topics into broader community discussions

Additional Observations

- Informal volunteer efforts play a critical role in service delivery in some communities.
- Local “champions” frequently address service gaps but often lack institutional support.
- There is a need for stronger coordination and visibility of existing services.
- Transportation and in-home services remain persistent structural gaps.

Discussion

The findings demonstrate a pattern of overlapping needs across counties. While each community has unique characteristics, shared challenges suggest systemic issues. Transportation and caregiver support are central barriers affecting independence and quality of life for older adults. Additionally, the reliance on informal networks highlights both community resilience and structural limitations.
The need for improved service coordination is evident, as many participants were unaware of available resources. This indicates an opportunity to strengthen outreach and information systems.

Recommendations

Based on the findings, the following actions are recommended:

1. **Expand transportation services** to improve access to healthcare and essential resources.
2. **Increase respite care capacity**, including flexible and short-duration options.
3. **Develop centralized resource directories** accessible via multiple channels.
4. **Implement regular check-in programs** for isolated older adults.
5. **Strengthen community partnerships**, including schools, faith-based organizations, and local agencies.
6. **Enhance outreach strategies** using a combination of traditional and digital methods.
7. **Support caregiver education and training initiatives**, particularly for dementia care.

Conclusion

This analysis of public comments reveals consistent and significant needs among older adults and caregivers across four Montana counties. Transportation, respite care, and social isolation are the most critical areas requiring attention. While communities demonstrate strong informal support systems, formal services are limited and unevenly distributed. Addressing these gaps will require coordinated planning, investment in key services, and improved communication strategies.

Attachment 3E Advisory Council Meeting(s)

Advisory Council Meeting
Thursday Oct. 15, 2026
11:00 AM

Summary:

The committee reviewed draft goals and planning timelines for the regional aging services plan.
• Six draft goals reflect transportation, housing, and caregiver needs.
• Goals remain unchanged; measurable targets may be revisited.
• State submission is due mid-December; review may take six months.
• Six-county public comment period is expected to last 30 days.
• Broadwater Senior Center restoration includes registrations, a website, and outreach.

Action Items:

* John Gorton will consider incorporating Clive Townsend’s comments into the plan materials.
* John Gorton will post the plan for a 30-day public-comment period across the six counties.
* John Gorton will send the plan to neighborhood and senior centers with a deadline for feedback.
* Rosie Greener will help promote public-comment opportunities.

Key Discussion Points:

Meeting Context and Opening
John clarified that the meeting was primarily for the advisory panel, while board members were welcome to attend if available. Clive Townsend said he had sent comments and John said he would consider incorporating them into the work.

Four-Year Plan and Proposed Goals
John described the advisory meeting as part of the documentation needed for the four-year plan summary and presented six proposed goal areas as a draft. Victor supported the goals and their ordering, pointing to transportation, housing, and caregiver needs; John noted that community comments and Polco survey results aligned.

Telehealth and Service Clarity
Rosie supported the goals and emphasized the need for technology assistance for older residents seeking remote specialist appointments. She also urged clearer, more straightforward information about caregiver and homemaker services.

Local Support for Remote Care
After a commissioner encountered audio problems, John expanded on the possibility of providing local support for telemedicine in frontier communities. He noted that remote care could reduce travel for some appointments but would not replace in-person care when needed.

Provider Changes and Brief Interruption
John asked whether St. Peter’s had withdrawn from Broadwater County, and Victor clarified that it had combined with Billings Clinic and would continue seeing patients there. The discussion paused briefly while John stepped away, followed by casual conversation about snowfall.

Service Terminology and External Feedback
John returned to Rosie’s concern that changing program names can make services difficult to understand. He said he had shared the draft with Courtney at a technical assistance center and was waiting for her feedback.

Goal Measurement and Performance Targets
John asked whether the goals should include measurable outcomes, and the group considered adding numerical targets to information and assistance measures. Victor recommended waiting for historical data before setting targets, and the group agreed to leave the goals open-ended for now.

State Review and Public Comment
John outlined the state submission and review schedule, including a mid-December submission and an approximately six-month review period. The group discussed a 30-day public-comment period across six counties, a possible follow-up meeting near the end of the month, and Rosie’s offer to help circulate the plan.

Senior Center Renewal and Community Outreach
Victor described Broadwater Senior Center’s efforts to restore registrations and operations, build a website, and become more active in the community. Participants connected the plan’s goals with local outreach and noted that Manhattan was also working to establish or revive a senior center.

Meeting Close and Recording Controls
Participants wrapped up the discussion and exchanged thanks. After the meeting had concluded, Heather and John tried to locate controls to stop the recording and remove the assistant.

Advisory Council Meeting
Thursday Oct. 29, 2026
11:00 AM

Summary:

The group reviewed the four-year plan and related community needs.
• Retain six broad goals, with flexibility for funding uncertainty.
• Transportation and economic security depend on external partnerships.
• Outreach strategies aim to engage younger older adults.
• Mar County data showed about 42% age 60 or older.

Action Items:

* John Gorton will prepare and release the revised plan for a 30-day public comment period, aiming for the following Monday.
* John Gorton will post the plan on the Rosie website and send printed copies to contractors and senior centers.
* John Gorton will incorporate necessary changes after the public comment period and submit the plan to the state by the mid-December deadline.
* John Gorton will include notes from the current and prior advisory meetings in the plan attachments to document consultation.
* John Gorton will put the plan on the agenda for discussion at the November board meeting.

Key Discussion Points:

Meeting Opening and Plan Revisions
The meeting opened with brief audio and attendance exchanges. John described the updated four-year plan, its length, and revisions to goals and strategies based on advisory feedback and Clive Tower’s comments.

Goal Specificity and Measurement
John explained why the goals should remain broad, citing uncertain funding and the need to accommodate outside partners. Rosie and another participant agreed that rigid numerical targets could make meaningful progress difficult to represent fairly.

Six Goals, Resources, and Partnerships
The group considered whether to retain all six goals and how to account for limited staff and funding. John discussed the need for partners in areas such as transportation and economic security, while distinguishing those broader efforts from outreach responsibilities within the agency’s control.

Outreach and Participation at Senior Centers
John and Rosie discussed ways to raise awareness across the six-county area, including public service announcements and coordinated newspaper advertising. Participants then considered declining participation among younger older adults and discussed whether community-center branding and activity-specific programming could help.

Public Comment and Plan Review Schedule
John described plans to distribute the revised plan for a 30-day public comment period, collect feedback, and submit the plan to the state by mid-December. The group discussed documenting advisory consultation and clarified that the November 19 board meeting would fall during the comment period.

County Demographics and Survey Materials
Victo and Rosie Greener discussed Mar County’s older population, the potential demographic impact of the Tintina mine, and ongoing housing studies. John Gorton clarified the sources of demographic data and described plans to compile Polco survey results into locally useful PDFs, while noting that some counties may not be separable in the data; the meeting then concluded with thanks and farewells.

Attachment 5A Service Projections

Area IV Programs Annual Estimates

Program	Total Units	Client Count	Service Unit Type	Notes
Congregate Nutrition	66000	2700	Meals	
Caregiver Support	200			Client Contacts, Plus Access to TruAlta
Evidence-Based Health Promotion Programs	200	15	Participants	Stepping On and Tai Chi classes
Friendly Visiting/Phone Reassurance	3800	20	Calls	
Home-Delivered Nutrition	130000	1100	Meals	
Homemaker Services	4050	80		
Information and Assistance	4300			Client Contacts
In-Home Respite	1300	20		
Skilled Nursing	120	20		
Sr Companions	12000	280		
Transportation	22000	500	Number of Rides	

Attachment 5B Projected Budget and Funding Allocations

2028 Budget Projection

	Area Admin	Area Wide Programs	Contracted Services**		Total
Personnel	$ 171,028.00	$ 417,492.50	$ 2,832,448.67		$ 3,420,969.17
Supplies	$ 502.00	$ 2,171.00	$ 149,902.00		$ 152,575.00
Communications	$ 5,880.00	$ 18,709.84	$ 60,430.20		$ 85,020.04
Utilities		$ -	$ 34,401.32		$ 34,401.32
Repairs/Maintenance		$ -	$ 54,288.00		$ 54,288.00
Travel & Training	$ 3,517.00	$ 13,783.35	$ 46,370.00		$ 63,670.35
Building Space	$ 15,095.00	$ 21,162.57	$ 97,816.73		$ 134,074.30
Insurance	$ 4,579.00	$ -	$ 76,093.19		$ 80,672.19
Equipment		$ -	$ 27,900.00		$ 27,900.00
Raw Food/Meals		$ -	$ 689,380.57		$ 689,380.57
Raw Food/Commodities		$ -	$ -		$ -
Contracted Services	$ 4,000.00	$ 46,500.00	$ 25,500.00		$ 76,000.00
Other	$ 16,380.00	$ 23,927.92	$ 105,074.18		$ 145,382.10
Indirect Costs	$ 28,274.00	$ 73,777.82	$ 276,779.12		$ 378,830.94
TOTAL	**$ 249,255.00**	**$ 617,525.00**	**$ 4,476,383.98**	**$ -**	**$ 5,343,163.98**
Sources of Funding:					
Carryover		$ -	$ -		$ -
Workforce funding					$ -
IIIB	$ 20,704.00	$ 53,845.00	$ 132,487.00		$ 207,036.00
IIIB Ombud		$ 35,334.00			$ 35,334.00
IIIC1	$ 38,155.00		$ 343,406.00		$ 381,561.00
IIIC2	$ 26,890.00		$ 242,013.00		$ 268,903.00
IIID		$ 12,830.00	$ 7,500.00		$ 20,330.00
IIIE	$ 14,226.00	$ 53,162.00	$ 74,877.00		$ 142,265.00
VII Ombud		$ 17,040.00			$ 17,040.00
VII-Elder Abuse		$ 2,623.00			$ 2,623.00
SHIP		$ 25,448.00	$ 32,355.00		$ 57,803.00
MIPPA - SHIP		$ 20,829.00			$ 20,829.00
MIPPA - AAA/ ADRC		$ 18,733.00			$ 18,733.00
STATE GF OMB		$ 42,572.00			$ 42,572.00
State General Fund	$ 142,454.00	$ 289,244.00	$ 992,845.00		$ 1,424,543.00
NSIP			$ 85,953.00		$ 85,953.00
Subtotal	*$ 242,429.00*	*$ 571,660.00*	*$1,911,436.00*	*$ -*	*$2,725,525.00*
Local Match	$ 5,607.00	$ -	$ 132,238.00		$ 137,845.00
In Kind Match			$ 10,151.00		$ 10,151.00
Commodities		$ -	$ -		$ -
Project Income		$ -	$ 595,908.08		$ 595,908.08
Other Resources	$ 1,219.00	$ 45,865.00	$ 1,826,650.90		$ 1,873,734.90
TOTAL	**$ 249,255.00**	**$ 617,525.00**	**$ 4,476,383.98**	**$ -**	**$ 5,343,163.98**

2028 Budget Projection Section B1

Area Wide Service Programs

Personnel	$ 172,946.00	$ 124,874.50		$ 60,242.00	$ 32,981.00	$ 15,463.00	$10,986.00			$417,493
Supplies	$ 553.00	$ 200.00			$ 563.00	$ 855.00				2,171
Communications	$ 7,607.00	$ 5,477.84		$ 2,030.00	$ 1,696.00	$ 1,051.00	$ 848.00			18,710
Utilities										-
Repairs/Maintenance										-
Travel & Training	$ 1,343.00	$ 4,700.00	$ 7,740.35							13,783
Building Space	$ 8,003.00	$ 6,249.57		$ 3,232.00	$ 1,850.00	$ 1,457.00	$ 371.00			21,163
Insurance										-
Equipment										-
Raw Food/Meals										-
Raw Food/Commodities										-
Contracted Services								$ 42,500.00	$ 4,000.00	46,500
Other	$ 21,460.00	$ 43.92				$ 1,156.00	$ 1,268.00			23,928
Indirect Costs	$ 27,984.00	$ 19,050.17	$ 1,083.65	$ 8,554.00	$ 4,768.00	$ 2,543.00	$ 1,735.00	$ 7,500.00	$ 560.00	73,778
TOTAL	**$ 239,896.00**	**$ 160,596.00**	**$ 8,824.00**	**$ 74,058.00**	**$ 41,858.00**	**$ 22,525.00**	**$15,208.00**	**$ 50,000.00**	**$ 4,560.00**	**$617,525**

Sources of Funding:										
Carryover										$ -
IIIB	$ 17,645.00	$ 19,200.00	$ 7,500.00				$ 9,500.00			53,845
IIIB Ombudsman		$ 35,334.00								35,334
IIID						$ 12,830.00				12,830
IIIE	$ 28,642.00				$ 24,520.00					53,162
VII Ombud		$ 17,040.00								17,040
VII Elder Abuse	$ 2,623.00									2,623
SHIP				$ 25,448.00						25,448
MIPPA - SHIP				$ 20,829.00						20,829
MIPPA - AAA/ ADRC	$ 18,733.00									18,733
STATE GF OMB		$ 42,572.00								42,572
State General Fund	$ 149,460.00	$ 31,450.00	$ 1,324.00	$ 27,414.00	$ 12,130.00	$ 7,273.00	$ 5,633.00	$ 50,000.00	$ 4,560.00	289,244
Sub-Total	*$ 217,103.00*	*$ 145,596.00*	*$8,824.00*	*$ 73,691.00*	*$ 36,650.00*	*$20,103.00*	*$15,133.00*	*$ 50,000.00*	*$4,560.00*	*$571,660*
Local Match *										-
Project Income										-
Other Resources	$ 22,793.00	$ 15,000.00		$ 367.00	$ 5,208.00	$ 2,422.00	$ 75.00			45,865
TOTAL	**$ 239,896.00**	**$ 160,596.00**	**$ 8,824.00**	**$ 74,058.00**	**$ 41,858.00**	**$ 22,525.00**	**$15,208.00**	**$ 50,000.00**	**$ 4,560.00**	**$617,525**

2028 Budget Projection
Contracted Aging Supportive Services
Section B2

Contracted Services	Transportation	Health Promotion	REACH Evidence Based	I&A/ SHIP	Outreach RSVP	Page Total
Personnel	440,833	30,000	15,556.32	144,009.84	186,143	$ 816,542
Supplies	3,450	2,700	500.00	300.00	2,032	8,982
Communications	5,050	100		500.00	4,748	10,398
Utilities	2,800	400				3,200
Repairs/Maintenance	33,832					33,832
Travel & Training	2,000			1,500.00	7,235	10,735
Building Space	5,160		1,500.00	3,000.00	17,292	26,952
Insurance	23,520	1,000		500.00	2,406	27,426
Equipment	11,000	800			1,500	13,300
Raw Food/Meals						-
Raw Food/Commodities						-
Contracted Services	1,500	3,500				5,000
Other	51,515		7,964.81		4,700	64,180
Indirect Costs				22,749.05	42,879	65,628
TOTAL	**$ 580,660**	**$ 38,500**	**25,521.13**	**172,558.89**	**$ 268,935**	**$1,086,175**
Sources of Funding:						
Carryover						$ -
IIIB	3,300	2,440				5,740
IIID			7,500.00			7,500
IIIE				27,783.00		27,783
SHIP				32,355.00		32,355
MIPPA - SHIP						-
MIPPA - AAA						-
MIPPA - ADRC						-
State General Fund	23,400	6,060	9,500.00	81,921.00	12,500	133,381
Sub-Total	*$ 26,700*	*$8,500*	*17,000.00*	*142,059.00*	*$12,500*	*$ 215,259*
Local Match *	582	430				1,012
In Kind Match						-
Project Income	59,600	27,618				87,218
Other Resources	493,778	1,952	8,521.13	30,499.89	256,435	791,186
TOTAL	**$ 580,660**	**$38,500**	**25,521.13**	**172,558.89**	**$ 268,935**	**$1,086,175**

* State funds used as match

2028 Budget Projection
Contracted Aging Supportive Services
Section B2 Continued

Contracted Services	Homemaker Services	Senior Companion	Telephone Reassurance	Page Total	Section Total	
Personnel	174,930.84	127,000	2,750	$ 304,681	$ 1,121,223	
Supplies	3,950.00	3,000		6,950	15,932	
Communications	850.00	15,000		15,850	26,248	
Utilities		-		-	3,200	
Repairs/Maintenance		-		-	33,832	
Travel & Training	6,775.00	4,000		10,775	21,510	
Building Space	1,000.00			1,000	27,952	
Insurance	1,750.00	4,000		5,750	33,176	
Equipment				-	13,300	
Traw Food/Meals				-	-	
Raw Food/Commodities				-	-	
Contracted Services		1,000		1,000	6,000	
Other	3,945.00	1,000		4,945	69,125	
Indirect Costs	22,964.40			22,964	88,592	
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**	**$ 1,460,090**	
Sources of Funding:						
Carryover				$ -	$ -	
IIIB	70,118.00			70,118	75,858	
IIIE				-	27,783	
SHIP Program				-	32,355	
IIID				-	7,500	
MIPPA - AAA				-	-	
MIPPA - ADRC				-	-	
State General Fund	120,620.00	12,000	2,750	135,370	268,751	
Sub-Total	*190,738.00*	*$ 12,000*	*$ 2,750*	*$ 205,488*	*$ 412,247*	
Local Match	5,007.00			5,007	6,019	
In Kind Match	7,368.00			7,368	7,368	
Project Income				-	87,218	
Other Resources	13,052.24	143,000		156,052	947,238	
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**		**$ 1,460,090**

2028 Budget Projection
Contracted Services
Section B4

Contracted Services	Respite Services	I & A	Total
Personnel	69,194.92		$ 69,195
Supplies	150.00		150
Communications	500.00		500
Utilities			-
Repairs/Maintenance			-
Travel & Training	1,400.00		1,400
Building Space	975.00		975
Insurance	200.00		200
Equipment			-
Raw Food/Meals			-
Raw Food/Commodities			-
Contracted Services			-
Other			-
Indirect Costs	18,215.10		18,215
TOTAL	**90,635.02**	**$ -**	**$ 90,635**

Sources of Funding:			
Carryover			$ -
IIIC2			-
IIIE	47,094.00		47,094
State General Fund	20,097.00		20,097
Sub-Total	*67,191.00*	*$ -*	*$ 67,191*
Local Match	12,915.00		12,915
In Kind Match	2,783.00		2,783
Project Income			-
Other Resources	7,746.02		7,746
TOTAL	**90,635.02**	**$ -**	**$ 90,635**

2028 Budget Projection
Section C1

Contracted Services		
Personnel	996,560.42	996,560.42
Supplies	48,830.00	48,830.00
Communications	20,652.04	20,652.04
Utilities	19,305.32	19,305.32
Repairs/Maintenance	11,754.00	11,754.00
Travel & Training	15,390.00	15,390.00
Building Space	47,413.58	47,413.58
Insurance	20,161.73	20,161.73
Equipment	9,780.00	9,780.00
Raw Food/Meals	276,617.03	276,617.03
Raw Food/Commodities	-	-
Contracted Services	8,600.00	8,600.00
Other	15,892.68	15,892.68
Indirect Costs	110,108.80	110,108.80
TOTAL		**1,601,065.60**

Sources of Funding:		
Carryover		-
IIIB	29,391.00	29,391.00
IIIC1	343,406.00	343,406.00
IIIC2		-
State General Fund	352,456.00	352,456.00
NSIP*	47,274.00	47,274.00
Subtotal		*772,527.00*
Local Match	65,788.00	65,788.00
Commodities		-
Project Income	295,370.08	295,370.08
Other Resources	467,380.52	467,380.52
TOTAL		**1,601,065.60**

*Estimate

2028 Budget Projection
Section C2

Contracted Services		
Personnel	645,470.33	645,470.33
Supplies	84,990.00	84,990.00
Communications	13,030.16	13,030.16
Utilities	11,896.00	11,896.00
Repairs/Maintenance	8,702.00	8,702.00
Travel & Training	8,070.00	8,070.00
Building Space	21,476.15	21,476.15
Insurance	22,555.46	22,555.46
Equipment	4,820.00	4,820.00
Raw Food/Meals	412,763.54	412,763.54
Raw Food/Commodities	-	-
Contracted Services	10,900.00	10,900.00
Other	20,056.69	20,056.69
Indirect Costs	59,862.77	59,862.77
TOTAL		**1,324,593.10**

Sources of Funding:		
Carryover		-
IIIB	27,238.00	27,238.00
IIIC1		-
IIIC2	242,013.00	242,013.00
State General Fund	351,541.00	351,541.00
NSIP*	38,679.00	38,679.00
Subtotal		*659,471.00*
Local Match	47,516.00	47,516.00
Commodities	-	-
Project Income	213,320.00	213,320.00
Other Resources	404,286.10	404,286.10
TOTAL		**1,324,593.10**

2029 Budget Projection
Area IV Agency on Aging

	Area Admin	Area Wide Programs*	Contracted Services**		Total
Personnel	$ 171,883.00	$ 418,954.50	$ 2,832,448.67		$ 3,423,286.17
Supplies	$ 505.00	$ 2,181.00	$ 149,902.00		$ 152,588.00
Communications	$ 5,909.00	$ 18,774.84	$ 60,430.20		$ 85,114.04
Utilities		$ -	$ 34,401.32		$ 34,401.32
Repairs/Maintenance		$ -	$ 54,288.00		$ 54,288.00
Travel & Training	$ 3,534.00	$ 14,090.35	$ 46,370.00		$ 63,994.35
Building Space	$ 15,170.00	$ 21,237.57	$ 97,816.73		$ 134,224.30
Insurance	$ 4,600.00	$ -	$ 76,093.19		$ 80,693.19
Equipment		$ -	$ 27,900.00		$ 27,900.00
Raw Food/Meals		$ -	$ 689,380.57		$ 689,380.57
Raw Food/Commodities		$ -	$ -		$ -
Contracted Services	$ 4,000.00	$ 46,500.00	$ 25,500.00		$ 76,000.00
Other	$ 16,462.00	$ 24,047.92	$ 105,074.18		$ 145,584.10
Indirect Costs	$ 28,415.00	$ 74,004.82	$ 276,779.12		$ 379,198.94
TOTAL	**$ 250,478.00**	**$ 619,791.00**	**$ 4,476,383.98**	**$ -**	**$ 5,346,652.98**
Sources of Funding:					
Carryover		$ -	$ -		$ -
Workforce funding					$ -
IIIB	$ 20,704.00	$ 53,845.00	$ 132,487.00		$ 207,036.00
IIIB Ombud		$ 35,334.00			$ 35,334.00
IIIC1	$ 38,155.00		$ 343,406.00		$ 381,561.00
IIIC2	$ 26,890.00		$ 242,013.00		$ 268,903.00
IIID		$ 12,830.00	$ 7,500.00		$ 20,330.00
IIIE	$ 14,226.00	$ 53,162.00	$ 74,877.00		$ 142,265.00
VII Ombud		$ 17,040.00			$ 17,040.00
VII-Elder Abuse		$ 2,623.00			$ 2,623.00
SHIP		$ 25,448.00	$ 32,355.00		$ 57,803.00
MIPPA - SHIP		$ 20,829.00			$ 20,829.00
MIPPA - AAA/ ADRC		$ 18,733.00			$ 18,733.00
STATE GF OMB		$ 42,572.00			$ 42,572.00
State General Fund	$ 142,454.00	$ 289,244.00	$ 992,845.00		$ 1,424,543.00
NSIP			$ 85,953.00		$ 85,953.00
Subtotal	*$ 242,429.00*	*$ 571,660.00*	*$1,911,436.00*	*$ -*	*$ 2,725,525.00*
Local Match	$ 5,607.00	$ -	$ 132,238.00		$ 137,845.00
In Kind Match			$ 10,151.00		$ 10,151.00
Commodities		$ -	$ -		$ -
Project Income		$ -	$ 595,908.08		$ 595,908.08
Other Resources	$ 2,442.00	$ 48,131.00	$ 1,826,650.90		$ 1,877,223.90
TOTAL	**$ 250,478.00**	**$ 619,791.00**	**$ 4,476,383.98**	**$ -**	**$ 5,346,652.98**

2029 Budget Projection
Area Wide Service Programs Section B1

	I & A	Ombudsman	Training	SHIP Assistance Service	Caregiver I&A	Evidence Based	Capstone I&A	GoGo Transportation	Home Modification	Page Total
Supplies	$ 556.00	$ 200.00			$ 565.00	$ 860.00				2,181
Communications	$ 7,645.00	$ 5,477.84		$ 2,040.00	$ 1,704.00	$ 1,056.00	$852.00			18,775
Utilities										-
Repairs/Maintenance										-
Travel & Training	$ 1,650.00	$ 4,700.00	$ 7,740.35							14,090
Building Space	$ 8,043.00	$ 6,249.57		$ 3,248.00	$ 1,860.00	$ 1,464.00	$ 373.00			21,238
Insurance										-
Equipment										-
Raw Food/Meals										-
Raw Food/Commodities										-
Contracted Services								$ 42,500.00	$ 4,000.00	46,500
Other	$ 21,567.00	$ 43.92				$ 1,162.00	$ 1,275.00			24,048
Indirect Costs	$ 28,123.00	$ 19,050.17	$ 1,083.65	$ 8,597.00	$ 4,792.00	$ 2,555.00	$ 1,744.00	$ 7,500.00	$ 560.00	74,005
TOTAL	**$ 241,395.00**	**$ 160,596.00**	**$ 8,824.00**	**$ 74,428.00**	**$ 42,066.00**	**$ 22,637.00**	**$ 15,285.00**	**$ 50,000.00**	**$ 4,560.00**	**$ 619,791**
Sources of Funding:										
Carryover										$ -
IIIB	$ 17,645.00	$ 19,200.00	$ 7,500.00				$ 9,500.00			53,845
IIIB Ombudsman		$ 35,334.00								35,334
IIID						$ 12,830.00				12,830
IIIE	$ 28,642.00				$ 24,520.00					53,162
VII Ombud		$ 17,040.00								17,040
VII Elder Abuse	$ 2,623.00									2,623
SHIP				$ 25,448.00						25,448
MIPPA - SHIP				$ 20,829.00						20,829
MIPPA - AAA/ ADRC	$ 18,733.00									18,733
STATE GF OMB		$ 42,572.00								42,572
State General Fund	$ 149,460.00	$ 31,450.00	$ 1,324.00	$ 27,414.00	$ 12,130.00	$ 7,273.00	$ 5,633.00	$ 50,000.00	$ 4,560.00	289,244
Sub-Total	*$ 217,103.00*	*$ 145,596.00*	*8,824.00*	*$ 73,691.00*	*$ 36,650.00*	*$ 20,103.00*	*$ 15,133.00*	*$ 50,000.00*	*$ 4,560.00*	*$ 571,660*
Local Match *										-
Project Income										-
Other Resources	$ 24,292.00	$ 15,000.00		$ 737.00	$ 5,416.00	$ 2,534.00	$ 152.00			48,131
TOTAL	**$ 241,395.00**	**$ 160,596.00**	**$ 8,824.00**	**$ 74,428.00**	**$ 42,066.00**	**$ 22,637.00**	**$ 15,285.00**	**$ 50,000.00**	**$ 4,560.00**	**$ 619,791**

* State funds used as match

2029 Budget Projection
Contracted Aging Supportive Services
Section B2

Contracted Services	Transportation	Health Promotion	REACH Evidence Based	I&A/ SHIP	Outreach RSVP	Page Total
Personnel	440,833	30,000	15,556.32	144,009.84	186,143	$ 816,542
Supplies	3,450	2,700	500.00	300.00	2,032	8,982
Communications	5,050	100		500.00	4,748	10,398
Utilities	2,800	400				3,200
Repairs/Maintenance	33,832					33,832
Travel & Training	2,000			1,500.00	7,235	10,735
Building Space	5,160		1,500.00	3,000.00	17,292	26,952
Insurance	23,520	1,000		500.00	2,406	27,426
Equipment	11,000	800			1,500	13,300
Raw Food/Meals						-
Raw Food/Commodities						-
Contracted Services	1,500	3,500				5,000
Other	51,515		7,964.81		4,700	64,180
Indirect Costs				22,749.05	42,879	65,628
TOTAL	**$ 580,660**	**$ 38,500**	**25,521.13**	**172,558.89**	**$268,935**	**$1,086,175**
Sources of Funding:						
Carryover						$ -
IIIB	3,300	2,440				5,740
IIID			7,500.00			7,500
IIIE				27,783.00		27,783
SHIP				32,355.00		32,355
MIPPA - SHIP						-
MIPPA - AAA						-
MIPPA - ADRC						-
State General Fund	23,400	6,060	9,500.00	81,921.00	12,500	133,381
Sub-Total	*$ 26,700*	*$ 8,500*	*17,000.00*	*142,059.00*	*$ 12,500*	*$ 215,259*
Local Match *	582	430				1,012
In Kind Match						-
Project Income	59,600	27,618				87,218
Other Resources	493,778	1,952	8,521.13	30,499.89	256,435	791,186
TOTAL	**$ 580,660**	**$ 38,500**	**25,521.13**	**172,558.89**	**$268,935**	**$1,086,175**

* State funds used as match

2029 Budget Projection
Contracted Aging Supportive Services
Section B2 Continued

Contracted Services	Homemaker Services	Senior Companion	Telephone Reassurance	Page Total	Section Total	
Personnel	174,930.84	127,000	2,750	$ 304,681	$1,121,223	
Supplies	3,950.00	3,000		6,950	15,932	
Communications	850.00	15,000		15,850	26,248	
Utilities		-		-	3,200	
Repairs/Maintenance		-		-	33,832	
Travel & Training	6,775.00	4,000		10,775	21,510	
Building Space	1,000.00			1,000	27,952	
Insurance	1,750.00	4,000		5,750	33,176	
Equipment				-	13,300	
Traw Food/Meals				-	-	
Raw Food/Commodities				-	-	
Contracted Services		1,000		1,000	6,000	
Other	3,945.00	1,000		4,945	69,125	
Indirect Costs	22,964.40			22,964	88,592	
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**	**$1,460,090**	
Sources of Funding:						
Carryover				$ -	$ -	
IIIB	70,118.00			70,118	75,858	
IIIE				-	27,783	
SHIP Program				-	32,355	
IIID				-	7,500	
MIPPA - AAA				-	-	
MIPPA - ADRC				-	-	
State General Fund	120,620.00	12,000	2,750	135,370	268,751	
Sub-Total	*190,738.00*	*$ 12,000*	*$ 2,750*	*$ 205,488*	*$ 412,247*	
Local Match	5,007.00			5,007	6,019	
In Kind Match	7,368.00			7,368	7,368	
Project Income				-	87,218	
Other Resources	13,052.24	143,000		156,052	947,238	
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**		**$1,460,090**

2029 Budget Projection
Contracted Caregiver Services
Section B4

Contracted Services	Respite Services	I & A	Total
Personnel	69,194.92		$ 69,195
Supplies	150.00		150
Communications	500.00		500
Utilities			-
Repairs/Maintenance			-
Travel & Training	1,400.00		1,400
Building Space	975.00		975
Insurance	200.00		200
Equipment			-
Raw Food/Meals			-
Raw Food/Commodities			-
Contracted Services			-
Other			-
Indirect Costs	18,215.10		18,215
TOTAL	**90,635.02**	**$ -**	**$ 90,635**
Sources of Funding:			
Carryover			$ -
IIIC2			-
IIIE	47,094.00		47,094
State General Fund	20,097.00		20,097
Sub-Total	*67,191.00*	*$ -*	*$ 67,191*
Local Match	12,915.00		12,915
In Kind Match	2,783.00		2,783
Project Income			-
Other Resources	7,746.02		7,746
TOTAL	**90,635.02**	**$ -**	**$ 90,635**

2029Budget Proposal
Congregate Meals
Section C1

Contracted Services		
Personnel	996,560.42	996,560.42
Supplies	48,830.00	48,830.00
Communications	20,652.04	20,652.04
Utilities	19,305.32	19,305.32
Repairs/Maintenance	11,754.00	11,754.00
Travel & Training	15,390.00	15,390.00
Building Space	47,413.58	47,413.58
Insurance	20,161.73	20,161.73
Equipment	9,780.00	9,780.00
Raw Food/Meals	276,617.03	276,617.03
Raw Food/Commodities	-	-
Contracted Services	8,600.00	8,600.00
Other	15,892.68	15,892.68
Indirect Costs	110,108.80	110,108.80
TOTAL		**1,601,065.60**
Sources of Funding:		
Carryover		-
IIIB	29,391.00	29,391.00
IIIC1	343,406.00	343,406.00
IIIC2		-
State General Fund	352,456.00	352,456.00
NSIP*	47,274.00	47,274.00
Subtotal		*772,527.00*
Local Match	65,788.00	65,788.00
Commodities		-
Project Income	295,370.08	295,370.08
Other Resources	467,380.52	467,380.52
TOTAL		**1,601,065.60**

*Estimate

2029 Budget Projection
Home Delivered Meals
Section C2

Contracted Services		
Personnel	645,470.33	645,470.33
Supplies	84,990.00	84,990.00
Communications	13,030.16	13,030.16
Utilities	11,896.00	11,896.00
Repairs/Maintenance	8,702.00	8,702.00
Travel & Training	8,070.00	8,070.00
Building Space	21,476.15	21,476.15
Insurance	22,555.46	22,555.46
Equipment	4,820.00	4,820.00
Raw Food/Meals	412,763.54	412,763.54
Raw Food/Commodities	-	-
Contracted Services	10,900.00	10,900.00
Other	20,056.69	20,056.69
Indirect Costs	59,862.77	59,862.77
TOTAL		**1,324,593.10**

Sources of Funding:		
Carryover		-
IIIB	27,238.00	27,238.00
IIIC1		-
IIIC2	242,013.00	242,013.00
State General Fund	351,541.00	351,541.00
NSIP*	38,679.00	38,679.00
Subtotal		*659,471.00*
Local Match	47,516.00	47,516.00
Commodities	-	-
Project Income	213,320.00	213,320.00
Other Resources	404,286.10	404,286.10
TOTAL		**1,324,593.10**

2030 Budget Projection
Area IV Agency on Aging

	Area Admin	Area Wide Programs*	Contracted Services**		Total
Personnel	$ 172,742.00	$ 420,423.50	$ 2,832,448.67		$3,425,614.17
Supplies	$ 507.00	$ 2,191.00	$ 149,902.00		$ 152,600.00
Communications	$ 5,938.00	$ 18,839.84	$ 60,430.20		$ 85,208.04
Utilities		$ -	$ 34,401.32		$ 34,401.32
Repairs/Maintenance		$ -	$ 54,288.00		$ 54,288.00
Travel & Training	$ 3,552.00	$ 14,098.35	$ 46,370.00		$ 64,020.35
Building Space	$ 15,245.00	$ 21,311.57	$ 97,816.73		$ 134,373.30
Insurance	$ 4,623.00	$ -	$ 76,093.19		$ 80,716.19
Equipment		$ -	$ 27,900.00		$ 27,900.00
Raw Food/Meals		$ -	$ 689,380.57		$ 689,380.57
Raw Food/Commodities		$ -	$ -		$ -
Contracted Services	$ 4,000.00	$ 46,500.00	$ 25,500.00		$ 76,000.00
Other	$ 16,544.00	$ 24,165.92	$ 105,074.18		$ 145,784.10
Indirect Costs	$ 28,557.00	$ 74,230.82	$ 276,779.12		$ 379,566.94
TOTAL	**$ 251,708.00**	**$ 621,761.00**	**$ 4,476,383.98**	**$ -**	**$5,349,852.98**
Sources of Funding:					
Carryover		$ -	$ -		$ -
Workforce funding					$ -
IIIB	$ 20,704.00	$ 53,845.00	$ 132,487.00		$ 207,036.00
IIIB Ombud		$ 35,334.00			$ 35,334.00
IIIC1	$ 38,155.00		$ 343,406.00		$ 381,561.00
IIIC2	$ 26,890.00		$ 242,013.00		$ 268,903.00
IIID		$ 12,830.00	$ 7,500.00		$ 20,330.00
IIIE	$ 14,226.00	$ 53,162.00	$ 74,877.00		$ 142,265.00
VII Ombud		$ 17,040.00			$ 17,040.00
VII-Elder Abuse		$ 2,623.00			$ 2,623.00
SHIP		$ 25,448.00	$ 32,355.00		$ 57,803.00
MIPPA - SHIP		$ 20,829.00			$ 20,829.00
MIPPA - AAA/ ADRC		$ 18,733.00			$ 18,733.00
STATE GF OMB		$ 42,572.00			$ 42,572.00
State General Fund	$ 142,454.00	$ 289,244.00	$ 992,845.00		$1,424,543.00
NSIP			$ 85,953.00		$ 85,953.00
Subtotal	*$ 242,429.00*	*$ 571,660.00*	*$ 1,911,436.00*	*$ -*	*$2,725,525.00*
Local Match	$ 5,607.00	$ -	$ 132,238.00		$ 137,845.00
In Kind Match			$ 10,151.00		$ 10,151.00
Commodities		$ -	$ -		$ -
Project Income		$ -	$ 595,908.08		$ 595,908.08
Other Resources	$ 3,672.00	$ 50,101.00	$ 1,826,650.90		$1,880,423.90
TOTAL	**$ 251,708.00**	**$ 621,761.00**	**$ 4,476,383.98**	**$ -**	**$5,349,852.98**

2030BudgetProjection
Area Wide Services
Section B1

	I & A	Ombudsman	Training	SHIP Assistance Service	Caregiver I&A	Evidence Based	Capstone I&A	GoGo Transportation	Home Modification	Page Total
Personnel	$ 174,680.00	$124,874.50		$60,845.00	$33,311.00	$15,617.00	$ 11,096.00			$ 420,424
Supplies	$ 559.00	$ 200.00			$ 568.00	$ 864.00				2,191
Communications	$ 7,683.00	$ 5,477.84		$ 2,050.00	$ 1,712.00	$ 1,061.00	$ 856.00			18,840
Utilities										-
Repairs/Maintenance										-
Travel & Training	$ 1,658.00	$ 4,700.00	$ 7,740.35							14,098
Building Space	$ 8,083.00	$ 6,249.57		$ 3,264.00	$ 1,869.00	$ 1,471.00	$ 375.00			21,312
Insurance										-
Equipment										-
Raw Food/Meals										-
Raw Food/Commodities										-
Contracted Services								$ 42,500.00	$4,000.00	46,500
Other	$ 21,674.00	$ 43.92				$ 1,167.00	$ 1,281.00			24,166
Indirect Costs	$ 28,263.00	$ 19,050.17	$ 1,083.65	$ 8,639.00	$ 4,816.00	$ 2,567.00	$ 1,752.00	$ 7,500.00	$ 560.00	74,231
TOTAL	**$ 242,600.00**	**$160,596.00**	**$ 8,824.00**	**$74,798.00**	**$42,276.00**	**$22,747.00**	**$ 15,360.00**	**$ 50,000.00**	**$4,560.00**	**$ 621,761**
Sources of Funding:										
Carryover										$ -
IIIB	$ 17,645.00	$ 19,200.00	$ 7,500.00				$ 9,500.00			53,845
IIIB Ombudsman		$ 35,334.00								35,334
IIID						$12,830.00				12,830
IIIE	$ 28,642.00				$24,520.00					53,162
VII Ombud		$ 17,040.00								17,040
VII Elder Abuse	$ 2,623.00									2,623
SHIP				$25,448.00						25,448
MIPPA - SHIP				$20,829.00						20,829
MIPPA - AAA/ ADRC	$ 18,733.00									18,733
STATE GF OMB		$ 42,572.00								42,572
State General Fund	$ 149,460.00	$ 31,450.00	$ 1,324.00	$27,414.00	$12,130.00	$ 7,273.00	$ 5,633.00	$ 50,000.00	$4,560.00	289,244
Sub-Total	*$ 217,103.00*	*$145,596.00*	*$ 8,824.00*	*$73,691.00*	*$36,650.00*	*$20,103.00*	*$ 15,133.00*	*$ 50,000.00*	*$4,560.00*	*$ 571,660*
Local Match *										-
Project Income										-
Other Resources	$ 25,497.00	$ 15,000.00		$ 1,107.00	$ 5,626.00	$ 2,644.00	$ 227.00			50,101
TOTAL	**$ 242,600.00**	**$160,596.00**	**$ 8,824.00**	**$74,798.00**	**$42,276.00**	**$22,747.00**	**$ 15,360.00**	**$ 50,000.00**	**$4,560.00**	**$ 621,761**

2030 Budget Projection
Contracted Aging Supportive Services
Section B2

Contracted Services	Transportation	Health Promotion	REACH Evidence Based	I&A/ SHIP	Outreach RSVP	Page Total
Personnel	440,833	30,000	15,556.32	144,009.84	186,143	$ 816,542
Supplies	3,450	2,700	500.00	300.00	2,032	8,982
Communications	5,050	100		500.00	4,748	10,398
Utilities	2,800	400				3,200
Repairs/Maintenance	33,832					33,832
Travel & Training	2,000			1,500.00	7,235	10,735
Building Space	5,160		1,500.00	3,000.00	17,292	26,952
Insurance	23,520	1,000		500.00	2,406	27,426
Equipment	11,000	800			1,500	13,300
Raw Food/Meals						-
Raw Food/Commodities						-
Contracted Services	1,500	3,500				5,000
Other	51,515		7,964.81		4,700	64,180
Indirect Costs				22,749.05	42,879	65,628
TOTAL	**$ 580,660**	**$ 38,500**	**25,521.13**	**172,558.89**	**$ 268,935**	**$1,086,175**
Sources of Funding:						
Carryover						$ -
IIIB	3,300	2,440				5,740
IIID			7,500.00			7,500
IIIE				27,783.00		27,783
SHIP				32,355.00		32,355
MIPPA - SHIP						-
MIPPA - AAA						-
MIPPA - ADRC						-
State General Fund	23,400	6,060	9,500.00	81,921.00	12,500	133,381
Sub-Total	*$ 26,700*	*$ 8,500*	*17,000.00*	*142,059.00*	*$ 12,500*	*$ 215,259*
Local Match *	582	430				1,012
In Kind Match						-
Project Income	59,600	27,618				87,218
Other Resources	493,778	1,952	8,521.13	30,499.89	256,435	791,186
TOTAL	**$ 580,660**	**$ 38,500**	**25,521.13**	**172,558.89**	**$ 268,935**	**$1,086,175**

* State funds used as match

2030 Budget Projection
Contracted Aging Supportive Services
Section B2

Contracted Services	Homemaker Services	Senior Companion	Telephone Reassurance	Page Total	Section Total
Personnel	174,930.84	127,000	2,750	$ 304,681	$1,121,223
Supplies	3,950.00	3,000		6,950	15,932
Communications	850.00	15,000		15,850	26,248
Utilities		-		-	3,200
Repairs/Maintenance		-		-	33,832
Travel & Training	6,775.00	4,000		10,775	21,510
Building Space	1,000.00			1,000	27,952
Insurance	1,750.00	4,000		5,750	33,176
Equipment				-	13,300
Traw Food/Meals				-	-
Raw Food/Commodities				-	-
Contracted Services		1,000		1,000	6,000
Other	3,945.00	1,000		4,945	69,125
Indirect Costs	22,964.40			22,964	88,592
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**	**$1,460,090**
Sources of Funding:					
Carryover				$ -	$ -
IIIB	70,118.00			70,118	75,858
IIIE				-	27,783
SHIP Program				-	32,355
IIID				-	7,500
MIPPA - AAA				-	-
MIPPA - ADRC				-	-
State General Fund	120,620.00	12,000	2,750	135,370	268,751
Sub-Total	*190,738.00*	*$ 12,000*	*$ 2,750*	*$ 205,488*	*$ 412,247*
Local Match	5,007.00			5,007	6,019
In Kind Match	7,368.00			7,368	7,368
Project Income				-	87,218
Other Resources	13,052.24	143,000		156,052	947,238
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**	**$ 1,460,090**

2030 Budget Projection Area
Contracted Caregiver Services
Section B4

Contracted Services	Respite Services	I & A	Total
Personnel	69,194.92		$ 69,195
Supplies	150.00		150
Communications	500.00		500
Utilities			-
Repairs/Maintenance			-
Travel & Training	1,400.00		1,400
Building Space	975.00		975
Insurance	200.00		200
Equipment			-
Raw Food/Meals			-
Raw Food/Commodities			-
Contracted Services			-
Other			-
Indirect Costs	18,215.10		18,215
TOTAL	**90,635.02**	**$ -**	**$ 90,635**
Sources of Funding:			
Carryover			$ -
IIIC2			-
IIIE	47,094.00		47,094
State General Fund	20,097.00		20,097
Sub-Total	*67,191.00*	*$ -*	*$ 67,191*
Local Match	12,915.00		12,915
In Kind Match	2,783.00		2,783
Project Income			-
Other Resources	7,746.02		7,746
TOTAL	**90,635.02**	**$ -**	**$ 90,635**

2030 Budget Projection Congregate Meals Section C1

Contracted Services		
Personnel	996,560.42	996,560.42
Supplies	48,830.00	48,830.00
Communications	20,652.04	20,652.04
Utilities	19,305.32	19,305.32
Repairs/Maintenance	11,754.00	11,754.00
Travel & Training	15,390.00	15,390.00
Building Space	47,413.58	47,413.58
Insurance	20,161.73	20,161.73
Equipment	9,780.00	9,780.00
Raw Food/Meals	276,617.03	276,617.03
Raw Food/Commodities	-	-
Contracted Services	8,600.00	8,600.00
Other	15,892.68	15,892.68
Indirect Costs	110,108.80	110,108.80
TOTAL		**1,601,065.60**
Sources of Funding:		
Carryover		-
IIIB	29,391.00	29,391.00
IIIC1	343,406.00	343,406.00
IIIC2		-
State General Fund	352,456.00	352,456.00
NSIP*	47,274.00	47,274.00
Subtotal		*772,527.00*
Local Match	65,788.00	65,788.00
Commodities		-
Project Income	295,370.08	295,370.08
Other Resources	467,380.52	467,380.52
TOTAL		**1,601,065.60**

*Estimate

2030 Budget Projection Home Delivered Meals Section C2

Contracted Services		
Personnel	645,470.33	645,470.33
Supplies	84,990.00	84,990.00
Communications	13,030.16	13,030.16
Utilities	11,896.00	11,896.00
Repairs/Maintenance	8,702.00	8,702.00
Travel & Training	8,070.00	8,070.00
Building Space	21,476.15	21,476.15
Insurance	22,555.46	22,555.46
Equipment	4,820.00	4,820.00
Raw Food/Meals	412,763.54	412,763.54
Raw Food/Commodities	-	-
Contracted Services	10,900.00	10,900.00
Other	20,056.69	20,056.69
Indirect Costs	59,862.77	59,862.77
TOTAL		**1,324,593.10**
Sources of Funding:		
Carryover		-
IIIB	27,238.00	27,238.00
IIIC1		-
IIIC2	242,013.00	242,013.00
State General Fund	351,541.00	351,541.00
NSIP*	38,679.00	38,679.00
Subtotal		*659,471.00*
Local Match	47,516.00	47,516.00
Commodities	-	-
Project Income	213,320.00	213,320.00
Other Resources	404,286.10	404,286.10
TOTAL		**1,324,593.10**

2031 Budget Projection
Area IV Agency on Aging

	Area Admin	Area Wide Programs*	Contracted Services**		Total
Personnel	$ 173,605.00	$ 421,899.50	$ 2,832,448.67		$ 3,427,953.17
Supplies	$ 509.00	$ 2,201.00	$ 149,902.00		$ 152,612.00
Communications	$ 5,967.00	$ 18,904.84	$ 60,430.20		$ 85,302.04
Utilities		$ -	$ 34,401.32		$ 34,401.32
Repairs/Maintenance		$ -	$ 54,288.00		$ 54,288.00
Travel & Training	$ 3,569.00	$ 14,106.35	$ 46,370.00		$ 64,045.35
Building Space	$ 15,321.00	$ 21,385.57	$ 97,816.73		$ 134,523.30
Insurance	$ 4,646.00	$ -	$ 76,093.19		$ 80,739.19
Equipment		$ -	$ 27,900.00		$ 27,900.00
Raw Food/Meals		$ -	$ 689,380.57		$ 689,380.57
Raw Food/Commodities		$ -	$ -		$ -
Contracted Services	$ 4,000.00	$ 46,500.00	$ 25,500.00		$ 76,000.00
Other	$ 16,626.00	$ 24,284.92	$ 105,074.18		$ 145,985.10
Indirect Costs	$ 28,699.00	$ 74,459.82	$ 276,779.12		$ 379,937.94
TOTAL	**$ 252,942.00**	**$ 623,742.00**	**$ 4,476,383.98**	**$ -**	**$ 5,353,067.98**
Sources of Funding:					
Carryover		$ -	$ -		$ -
Workforce funding					$ -
IIIB	$ 20,704.00	$ 53,845.00	$ 132,487.00		$ 207,036.00
IIIB Ombud		$ 35,334.00			$ 35,334.00
IIIC1	$ 38,155.00		$ 343,406.00		$ 381,561.00
IIIC2	$ 26,890.00		$ 242,013.00		$ 268,903.00
IIID		$ 12,830.00	$ 7,500.00		$ 20,330.00
IIIE	$ 14,226.00	$ 53,162.00	$ 74,877.00		$ 142,265.00
VII Ombud		$ 17,040.00			$ 17,040.00
VII-Elder Abuse		$ 2,623.00			$ 2,623.00
SHIP		$ 25,448.00	$ 32,355.00		$ 57,803.00
MIPPA - SHIP		$ 20,829.00			$ 20,829.00
MIPPA - AAA/ ADRC		$ 18,733.00			$ 18,733.00
STATE GF OMB		$ 42,572.00			$ 42,572.00
State General Fund	$ 142,454.00	$ 289,244.00	$ 992,845.00		$ 1,424,543.00
NSIP			$ 85,953.00		$ 85,953.00
Subtotal	*$ 242,429.00*	*$ 571,660.00*	*$ 1,911,436.00*	*$ -*	*$2,725,525.00*
Local Match	$ 5,607.00	$ -	$ 132,238.00		$ 137,845.00
In Kind Match			$ 10,151.00		$ 10,151.00
Commodities		$ -	$ -		$ -
Project Income		$ -	$ 595,908.08		$ 595,908.08
Other Resources	$ 4,906.00	$ 52,082.00	$ 1,826,650.90		$ 1,883,638.90
TOTAL	**$ 252,942.00**	**$ 623,742.00**	**$ 4,476,383.98**	**$ -**	**$ 5,353,067.98**

2031 Budget Projection Area Wide Service Programs Section B1

	I & A	Ombudsman	Training	SHIP Assistance Service	Caregiver I&A	Evidence Based	Capstone I&A	GoGo Transportation	Home Modification	Page Total
Personnel	$ 175,553.00	$ 124,874.50		$ 61,149.00	$ 33,477.00	$ 15,695.00	$ 11,151.00			$421,900
Supplies	$ 562.00	$ 200.00			$ 571.00	$ 868.00				2,201
Communications	$ 7,721.00	$ 5,477.84		$ 2,060.00	$ 1,720.00	$ 1,066.00	$ 860.00			18,905
Utilities										-
Repairs/Maintenance										-
Travel & Training	$ 1,666.00	$ 4,700.00	$7,740.35							14,106
Building Space	$ 8,123.00	$ 6,249.57		$ 3,280.00	$ 1,878.00	$ 1,478.00	$ 377.00			21,386
Insurance										-
Equipment										-
Raw Food/Meals										-
Raw Food/Commodities										-
Contracted Services								$ 42,500.00	$ 4,000.00	46,500
Other	$ 21,782.00	$ 43.92				$ 1,172.00	$ 1,287.00			24,285
Indirect Costs	$ 28,404.00	$ 19,050.17	$1,083.65	$ 8,682.00	$ 4,840.00	$ 2,579.00	$ 1,761.00	$ 7,500.00	$ 560.00	74,460
TOTAL	**$ 243,811.00**	**$ 160,596.00**	**$8,824.00**	**$ 75,171.00**	**$ 42,486.00**	**$ 22,858.00**	**$ 15,436.00**	**$ 50,000.00**	**$ 4,560.00**	**$623,742**
Sources of Funding:										
Carryover										$ -
IIIB	$ 17,645.00	$ 19,200.00	$7,500.00				$ 9,500.00			53,845
IIIB Ombudsman		$ 35,334.00								35,334
IIID						$ 12,830.00				12,830
IIIE	$ 28,642.00				$ 24,520.00					53,162
VII Ombud		$ 17,040.00								17,040
VII Elder Abuse	$ 2,623.00									2,623
SHIP				$ 25,448.00						25,448
MIPPA - SHIP				$ 20,829.00						20,829
MIPPA - AAA/ ADRC	$ 18,733.00									18,733
STATE GF OMB		$ 42,572.00								42,572
State General Fund	$ 149,460.00	$ 31,450.00	$1,324.00	$ 27,414.00	$ 12,130.00	$ 7,273.00	$ 5,633.00	$ 50,000.00	$ 4,560.00	289,244
Sub-Total	*$217,103.00*	*$ 145,596.00*	*$8,824.00*	*$73,691.00*	*$ 36,650.00*	*$ 20,103.00*	*$ 15,133.00*	*$ 50,000.00*	*$ 4,560.00*	*$571,660*
Local Match *										-
Project Income										-
Other Resources	$ 26,708.00	$ 15,000.00		$ 1,480.00	$ 5,836.00	$ 2,755.00	$ 303.00			52,082
TOTAL	**$ 243,811.00**	**$ 160,596.00**	**$8,824.00**	**$ 75,171.00**	**$ 42,486.00**	**$ 22,858.00**	**$ 15,436.00**	**$ 50,000.00**	**$ 4,560.00**	**$623,742**

* State funds used as match

2031 Budget Projection
Contracted Aging Supportive Services
Section B2

Contracted Services	Transportation	Health Promotion	REACH Evidence Based	I&A/ SHIP	Outreach RSVP	Page Total
Personnel	440,833	30,000	15,556.32	144,009.84	186,143	$ 816,542
Supplies	3,450	2,700	500.00	300.00	2,032	8,982
Communications	5,050	100		500.00	4,748	10,398
Utilities	2,800	400				3,200
Repairs/Maintenance	33,832					33,832
Travel & Training	2,000			1,500.00	7,235	10,735
Building Space	5,160		1,500.00	3,000.00	17,292	26,952
Insurance	23,520	1,000		500.00	2,406	27,426
Equipment	11,000	800			1,500	13,300
Raw Food/Meals						-
Raw Food/Commodities						-
Contracted Services	1,500	3,500				5,000
Other	51,515		7,964.81		4,700	64,180
Indirect Costs				22,749.05	42,879	65,628
TOTAL	**$ 580,660**	**$ 38,500**	**25,521.13**	**172,558.89**	**$ 268,935**	**$ 1,086,175**
Sources of Funding:						
Carryover						$ -
IIIB	3,300	2,440				5,740
IIID			7,500.00			7,500
IIIE				27,783.00		27,783
SHIP				32,355.00		32,355
MIPPA - SHIP						-
MIPPA - AAA						-
MIPPA - ADRC						-
State General Fund	23,400	6,060	9,500.00	81,921.00	12,500	133,381
Sub-Total	*$ 26,700*	*$ 8,500*	*17,000.00*	*142,059.00*	*$ 12,500*	*$ 215,259*
Local Match *	582	430				1,012
In Kind Match						-
Project Income	59,600	27,618				87,218
Other Resources	493,778	1,952	8,521.13	30,499.89	256,435	791,186
TOTAL	**$ 580,660**	**$ 38,500**	**25,521.13**	**172,558.89**	**$ 268,935**	**$ 1,086,175**

* State funds used as match

2031 Budget Projection
Contracted Aging Supportive Services
Section B2, Continued

Contracted Services	Homemaker Services	Senior Companion	Telephone Reassurance	Page Total	Section Total	
Personnel	174,930.84	127,000	2,750	$ 304,681	$ 1,121,223	
Supplies	3,950.00	3,000		6,950	15,932	
Communications	850.00	15,000		15,850	26,248	
Utilities		-		-	3,200	
Repairs/Maintenance		-		-	33,832	
Travel & Training	6,775.00	4,000		10,775	21,510	
Building Space	1,000.00			1,000	27,952	
Insurance	1,750.00	4,000		5,750	33,176	
Equipment				-	13,300	
Traw Food/Meals				-	-	
Raw Food/Commodities				-	-	
Contracted Services		1,000		1,000	6,000	
Other	3,945.00	1,000		4,945	69,125	
Indirect Costs	22,964.40			22,964	88,592	
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**	**$ 1,460,090**	
Sources of Funding:						
Carryover				$ -	$ -	
IIIB	70,118.00			70,118	75,858	
IIIE				-	27,783	
SHIP Program				-	32,355	
IIID				-	7,500	
MIPPA - AAA				-	-	
MIPPA - ADRC				-	-	
State General Fund	120,620.00	12,000	2,750	135,370	268,751	
Sub-Total	*190,738.00*	*$ 12,000*	*$ 2,750*	*$ 205,488*	*$ 412,247*	
Local Match	5,007.00			5,007	6,019	
In Kind Match	7,368.00			7,368	7,368	
Project Income				-	87,218	
Other Resources	13,052.24	143,000		156,052	947,238	
TOTAL	**216,165.24**	**$ 155,000**	**$ 2,750**	**$ 373,915**		**$1,460,090**

2031 Budget Projection Contracted Caregiver Services Section B4

Contracted Services	Respite Services	I & A	Total
Personnel	69,194.92		$ 69,195
Supplies	150.00		150
Communications	500.00		500
Utilities			-
Repairs/Maintenance			-
Travel & Training	1,400.00		1,400
Building Space	975.00		975
Insurance	200.00		200
Equipment			-
Raw Food/Meals			-
Raw Food/Commodities			-
Contracted Services			-
Other			-
Indirect Costs	18,215.10		18,215
TOTAL	**90,635.02**	**$ -**	**$ 90,635**

Sources of Funding:			
Carryover			$ -
IIIC2			-
IIIE	47,094.00		47,094
State General Fund	20,097.00		20,097
Sub-Total	*67,191.00*	*$ -*	*$ 67,191*
Local Match	12,915.00		12,915
In Kind Match	2,783.00		2,783
Project Income			-
Other Resources	7,746.02		7,746
TOTAL	**90,635.02**	**$ -**	**$ 90,635**

2031 Budget Projection Congregate Meals Section C1

Contracted Services		
Personnel	996,560.42	996,560.42
Supplies	48,830.00	48,830.00
Communications	20,652.04	20,652.04
Utilities	19,305.32	19,305.32
Repairs/Maintenance	11,754.00	11,754.00
Travel & Training	15,390.00	15,390.00
Building Space	47,413.58	47,413.58
Insurance	20,161.73	20,161.73
Equipment	9,780.00	9,780.00
Raw Food/Meals	276,617.03	276,617.03
Raw Food/Commodities	-	-
Contracted Services	8,600.00	8,600.00
Other	15,892.68	15,892.68
Indirect Costs	110,108.80	110,108.80
TOTAL		**1,601,065.60**

Sources of Funding:		
Carryover		-
IIIB	29,391.00	29,391.00
IIIC1	343,406.00	343,406.00
IIIC2		-
State General Fund	352,456.00	352,456.00
NSIP*	47,274.00	47,274.00
Subtotal		*772,527.00*
Local Match	65,788.00	65,788.00
Commodities		-
Project Income	295,370.08	295,370.08
Other Resources	467,380.52	467,380.52
TOTAL		**1,601,065.60**

*Estimate

2031 Budget Projection
Home Delivered Meals
Section C2

Contracted Services		
Personnel	645,470.33	645,470.33
Supplies	84,990.00	84,990.00
Communications	13,030.16	13,030.16
Utilities	11,896.00	11,896.00
Repairs/Maintenance	8,702.00	8,702.00
Travel & Training	8,070.00	8,070.00
Building Space	21,476.15	21,476.15
Insurance	22,555.46	22,555.46
Equipment	4,820.00	4,820.00
Raw Food/Meals	412,763.54	412,763.54
Raw Food/Commodities	-	-
Contracted Services	10,900.00	10,900.00
Other	20,056.69	20,056.69
Indirect Costs	59,862.77	59,862.77
TOTAL		**1,324,593.10**

Sources of Funding:		
Carryover		-
IIIB	27,238.00	27,238.00
IIIC1		-
IIIC2	242,013.00	242,013.00
State General Fund	351,541.00	351,541.00
NSIP*	38,679.00	38,679.00
Subtotal		*659,471.00*
Local Match	47,516.00	47,516.00
Commodities	-	-
Project Income	213,320.00	213,320.00
Other Resources	*404,286.10*	*404,286.10*
TOTAL		**1,324,593.10**

Attachment 6A Provider Listing

BOZEMAN SENIOR SOCIAL CENTER
Shannon Bondy
807 N. Tracy
Bozeman, MT 59715
Phone: 406-586-2421

BROADWATER COUNTY HEALTH DEPT.
Ruby Taylor
124 North Cedar
Townsend, MT 59644
Phone: 406-266-5209

DISTRICT IX HRDC
Heather Grenier, Exec. Dir.
Andi Salsbury
206 E Griffin Dr.
Bozeman, MT 59715
Phone: 406-587-4486

HELP CENTER, INC.
Kathy Allen
699 Farmhouse Ln
Bozeman, MT 59715
Phone: 406-586-3333

BEFRIENDERS
Kristin VanDeWalle
807 N. Tracy
Bozeman, MT 59715
Phone: 406-522-8169

A PLUS HEALTH CARE
Teddi Everett
Amanda Hawley
555 Fuller Ave, Suite 3
Helena, MT 59601
Phone: 406-443-3866

LIVINGSTON MEALS ON WHEELS
Tabatha Streuly
817 W. Park St.
Livingston, MT 59047
Phone: 406-333-2490

MEAGHER COUNTY SENIOR CENTER
PO Box 682 (101 First Ave. E.)
WSS, MT 59645
Beth Hunt, Director
Phone: 406-547-3651

ANGEL LINE TRANSPORTATION
Kendra Fox
414 E. Callender St.
Livingston, MT 59047
Phone: 406-222-4116

AREA IV MEAL SITES:

BROADWATER, JEFFERSON, L&C
BOULDER-BASIN SENIOR CENTER
Pat Lewis
201 S. Main Street / PO Box 669
Boulder, MT 59632
Phone: 406-225-3656

TOWNSEND SENIOR CENTER
Carol Anderson
516 2nd St.
Townsend, MT 59644
Phone: 406-266-3995

LINCOLN SENIOR CENTER
Diane Ironi
PO Box 56 / 801 Main
Lincoln, MT 59639
Phone: 406-392-4504

WHITEHALL SENIOR CENTER
Tami St. John
3 N. Division St.
Whitehall, MT 59759
Phone: 406-287-5336

HELENA DAILY DINNER CLUB
Mindy Diehl
200 Cruse Ave.
Helena, MT 59601
Phone: 406-447-1680

HELENA INDIAN ALLIANCE
Director
501 Euclid Ave.
Helena, MT 59601
406-449-5796

AUGUSTA DAILY DINNER CLUB
Jennifer Smith
134 Main St.
Augusta, MT 59410
Phone: 406-562-3623

GALLATIN COUNTY
BOZEMAN SENIOR SOCIAL CENTER
Shannon Bondy
807 N. Tracy
Bozeman, MT 59715
Phone: 406-586-2421

THREE FORKS SENIOR CENTER
Trish Orr
19 East Cedar

GALAVAN TRANSPORTATION
Sunshine Ross
1812 N. Rouse
Bozeman, MT 59715
Phone: 406-587-2434

RSVP of Southwest Montana
Andi Salsbury
206 E. Griffin Dr.
Bozeman, MT 59715
Phone: 406-587-5486 Livingston 406-222-2281

MEAGHER COUNTY HEALTH DEPT.
Eva Kerr, Public Health Nurse
P.O. Box 309
WSS, MT 59645
Phone: 406-547-3234

RMDC TRI COUNTY NUTRITION
Mindy Diehl
PO Box 1717
Helena, MT 59624
Phone: 406-447-1680

BELGRADE SENIOR CENTER
Lisa Beedy
92 Cameron Rd.
Belgrade, MT 59714
Phone: 406-388-4711

MANHATTAN SENIOR CENTER
Emma Burke
102 E. Main St.
Manhattan, MT 59741
Phone: 406-284-6501

Three Forks, MT 59752
Phone: 406-285-3235

WEST YELLOWSTONE SENIOR CENTER
Lindsey Charlton
10 Geyser St
West Yellowstone, MT 59758
Phone: 406-640-0241

MANHATTAN SENIOR CENTER
Emma Burke
102 E. Main St.
Manhattan, MT 59741
Phone: 406-284-6501

BELGRADE SENIOR CENTER
Lisa Beedy
92 Cameron Rd.
Belgrade, MT 59714
Phone: 406-388-4711

MEAGHER COUNTY
MEAGHER COUNTY SENIOR CENTER
Beth Hunt
101 First Ave. SE
WSS, MT 59645
Phone: 406-547-3651

PARK COUNTY
LIVINGSTON MEALS ON WHEELS
Tabatha Streuly
817 W. Park St.
Livingston, MT 59047
Phone: 406-333-2490

Attachment 6B Homemaker Services Overview

Homemaker and respite services funded through Rocky's Agency on Aging with State and Older American's Act funding.

Under the Older Americans Act (OAA), homemaker services are a direct supportive service for older adults 60 and over, while respite care is a direct service that provides temporary relief to family caregivers. Though often complementary, they are distinct services provided under different sections of the OAA. "Homemaker respite" is not a defined term under the OAA but describes using homemaker services to achieve the goal of respite.

Homemaker services

This is an in-home service that provides direct assistance to older adults 60 and over to help them live independently.

- **Purpose:** To assist older adults with routine household tasks, ensuring a safe and manageable living environment.
- **Funding source:** Primarily funded through OAA Title III-B, which provides grants for supportive services and senior centers.
- **Examples:** Tasks often include light housekeeping, laundry, grocery shopping, and meal preparation.
- **Beneficiary:** The older adult themselves, helping them to maintain their independence.

Respite care

This service provides temporary relief to family caregivers from their demanding caregiving responsibilities.

- **Purpose:** To prevent caregiver burning out and support the caregiver's well-being, which in turn helps keep the older adult in their home for as long as possible.
- **Funding source:** Primarily funded through OAA Title III-E, which established the National Family Caregiver Support Program (NFCSP).
- **Examples:** Respite can be provided in various settings, including in-home care, adult day care, or short-term stays at a facility.
- **Beneficiary:** The primary caregiver, with the service ultimately benefiting both the caregiver and the care recipient.

Homemaker respite

This term is not explicitly defined in the OAA, but it reflects a flexible application of OAA services.

- **Function:** It refers to when a homemaker service is specifically used to provide temporary relief to a caregiver.
- **Example:** A homemaker is hired to do household chores for a few hours, allowing the family caregiver to take a break for that period.
- **Funding source:** Depending on the specific service provided, funding may come from either Title III-B (supportive services) or Title III-E (NFCSP).

Summary of distinctions

Feature	Homemaker Services	Respite Care	Homemaker Respite
Primary Goal	To help the older adult with daily home maintenance.	To give the family caregiver a temporary break.	A homemaker service used to provide caregiver relief.

Main Beneficiary	The older adult who needs the services.	The family or informal caregiver.	The family caregiver.
OAA Title	Title III-B (Supportive Services).	Title III-E (National Family Caregiver Support Program).	The specific funding source depends on how the service is structured and delivered at the state and local level.
Who receives service?	The older adult in their home.	The care recipient, allowing the caregiver to take time off.	The care recipient, while the caregiver is on a break.

For more information:

https://www.rmdc.net/what-we-do/senior-services/agency-on-aging.html

Montana.gov site

National Family Caregiver Support Program (NFCSP)

Older Americans Act (OAA).

Attachment 6C Ombudsman Program Description

MT LTC Ombudsman Program 2020

CHAPTER 6 LOCAL OMBUDSMAN
Section 6.1 Local Long-Term Care Ombudsman Responsibilities Policy and Procedures
A local ombudsman (representative of the Office) is designated by the State Ombudsman to provide ombudsman services in the service area designated in the provider agency contract for ombudsman services. A local ombudsman may be employed by the Provider Agency or serve as a volunteer.

PROCEDURES
Local Ombudsman general responsibilities
a. Local Long-Term Care Ombudsman (LLTCO) are responsible for: a. providing LTCO services to protect the health, safety, welfare and rights of residents in accordance with the provisions of the federal and state laws governing the LLTCO and with the provisions of the Provider Agency contract for LTCO services.
b. fulfilling the Program components specified in this manual.
c. documenting LLTCO activities and case work as required by the Office through the Montana Ombudsman Data System (MODS) as follows:
i. Case logs/notes by the last day of the month.
ii. Activities by the 10th day of the following month.
Example: Activities/Facility Visits for January will be entered into MODs no later than February 10.
d. adhering to the Montana Ombudsman Program Code of Ethics.
e. preventing inappropriate access to LTCO records in the possession of the LTCO Program as specified in this manual.
f. carrying out other activities, approved by the Provider Agency, that the Office deems appropriate; and
g. performing each responsibility in accordance with all applicable federal and state law, regulations and policies.

In carrying out the duties of the Office, the Ombudsman may designate an Entity as a Provider Agency and may designate an employee or volunteer of the Provider Agency as a representative of the Office. Representatives of the Office may also be designated employees or volunteers within the Office.

Duties.
a. An individual designated as a representative of the Office shall, in accordance with the policies and procedures established by the Office and the State agency:
b. Local ombudsman shall conduct regular and timely visits to long-term care facilities to ensure the safety, welfare, and rights of residents are maintained.
i. All Representatives of the Office shall only wear the identification badge which is issued by the Aging Services Bureau each time they enter a facility and show the badge to anyone that asks the reason for their presence. The titles listed on the identification badge shall not be altered.
c. Provide services to protect the health, safety, welfare, and rights of residents.
d. Ensure that residents in the service area of the local Ombudsman entity have regular and timely access to the services provided through the Ombudsman program and that residents and complainants receive timely responses to requests for information and complaints.
e. Represent the interests of residents before government agencies and assure that individual residents have access to and pursue (as the representative of the Office determines necessary and consistent with resident interest) administrative, legal, and other remedies to protect the health, safety, welfare, and rights of the residents.
f. Review, and if necessary, comment on any existing and proposed laws, regulations, and other government policies and actions, which pertain to the rights and well-being of residents.
g. Facilitate the ability of the public to comment on the laws, regulations, promote, provide technical support for the development of, provide ongoing support as requested by resident and family councils; and carry out other activities that the Ombudsman determines to be appropriate.

Attachment 6D Ombudsman Facility Assignments

Facility	City/Town	County
Bear Grass Suites	Boulder	Jefferson
Billings Clinic Broadwater	Townsend	Broadwater
Caslen Living Centers, Inc. dba Son Heaven Assisted Living I	Helena	Lewis & Clark
Caslen Living Centers, Inc. dba Son Heaven Assisted Living II	Helena	Lewis & Clark
Cooney Healthcare and Rehabilitation	Helena	Lewis & Clark
Edgewood Helena Senior Care	Helena	Lewis & Clark
Elkhorn Healthcare and Rehabilitation	Clancy	Jefferson
Golden Options	MT City	Jefferson
Masonic Home of MT	Helena	Lewis & Clark
Mount Ascension Transitional Care of Cascadia	Helena	Lewis & Clark
Mountain View Medical Center	WSS	Meagher
Quality Senior Care, LLC dba Bee Hive Homes of Helena (North)	Helena	Lewis & Clark
Quality Senior Care, LLC dba Bee Hive Homes of Helena 11	Helena	Lewis & Clark
Quality Senior Care, LLC dba Bee Hive Homes of Helena 13	Helena	Lewis & Clark
Quality Senior Care, LLC dba Bee Hive Homes of Helena 16	Helena	Lewis & Clark
Quality Senior Care, LLC dba Bee Hive Homes of Helena 18	Helena	Lewis & Clark
Quality Senior Care, LLC dba Bee Hive Homes of Helena 9	Helena	Lewis & Clark
Renaissance Senior Care Wildwood North	Helena	Lewis & Clark
Renaissance Senior Care Wildwood South	Helena	Lewis & Clark
Renaissance Senior Care Helena	Helena	Lewis & Clark
Renaissance Senior Care Stone Meadow	Helena	Lewis & Clark
Serenity Point Assisted Living	Townsend	Broadwater
Sharon's Sunshine Care, LLC	Helena	Lewis & Clark
Silver Springs Assisted Living	Townsend	Broadwater
Touchmark on Saddle Drive	Helena	Lewis & Clark

Facility	City/Town	County
Churchhill	Churchhill	Gallatin
Edgewood	Belgrade	Gallatin
Bee Hive	Belgrade	Gallatin
Open Arms	Belgrade	Gallatin
High Country Care	Bozeman	Gallatin
Highgate	Bozeman	Gallatin
Hyalite	Bozeman	Gallatin
Spring Creek Inn	Bozeman	Gallatin
Gallatin Rest Home	Bozeman	Gallatin
Birchwood	Bozeman	Gallatin
Bozeman Lodge	Bozeman	Gallatin
Brookdale	Bozeman	Gallatin
Liberty Place 1	Whitehall	Jefferson
Liberty Place 2	Whitehall	Jefferson
Meadowlark	Whitehall	Jefferson
Livingston Health and Rehab	Livingston	Park
Caslen	Livingston	Park
Livingston SNF	Livingston	Park
Frontier	Livingston	Park

Attachment 8A Monitoring and Quality Management Framework

Executive Summary Area IV Subrecipient Monitoring Manual

The Area IV Agency on Aging is committed to ensuring that Older Americans Act and other public funds are administered effectively, responsibly, and in compliance with all applicable federal, state, and local requirements. This Subrecipient Monitoring Manual establishes a comprehensive framework for the oversight, monitoring, and support of organizations that receive funding through Area IV.

This manual is developed in accordance with the requirements of the **Older Americans Act of 1965, as amended**, applicable provisions of **45 CFR Part 1321**, and the federal grant management requirements contained in **2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards)**. Emphasis is placed on the responsibilities of pass-through entities under **2 CFR §200.332**, which requires ongoing oversight and monitoring of subrecipients to ensure that federal awards are used for authorized purposes, performance goals are achieved, and all applicable laws and regulations are followed.

The purpose of this manual is to promote accountability, strengthen program performance, safeguard public resources, and ensure that services provided to older adults and caregivers are delivered efficiently and effectively. The monitoring process is designed not only to verify compliance with contractual and regulatory requirements but also to provide technical assistance, identify opportunities for improvement, and support organizational capacity building among funded providers.

Area IV employs a risk-based monitoring approach that allocates oversight resources according to the level of risk presented by each subrecipient. Consistent with the principles of **2 CFR Part 200**, factors such as organizational capacity, financial management practices, prior monitoring results, audit findings, leadership stability, and program complexity are evaluated to determine the nature, scope, and frequency of monitoring activities. Comprehensive risk assessments and monitoring plans are conducted on a biennial cycle and may be reviewed or updated annually or whenever significant changes occur.

Monitoring activities may include document reviews, fiscal monitoring, program monitoring, governance assessments, site visits, technical assistance, corrective action follow-up, and closeout procedures. These activities are conducted to ensure compliance with contractual obligations, federal and state requirements, fiscal accountability standards, and performance expectations established by the **Administration for Community Living (ACL)**, the **Montana Department of Public Health and Human Services Senior and Long-Term Care Division**, and Area IV funding agreements.

This manual also establishes documentation standards, monitoring procedures, corrective action requirements, and record-retention expectations to ensure consistency, transparency, and accountability across all monitoring activities. Through these practices, Area IV fulfills its stewardship responsibilities as a pass-through entity while supporting continuous quality improvement and effective service delivery throughout the Planning and Service Area.

Ultimately, this manual serves as both a compliance tool and a collaborative resource, providing a structured framework through which Area IV and its subrecipients can work together to strengthen programs, improve outcomes, and advance the goals of the Older Americans Act. By maintaining effective oversight and fostering strong partnerships, Area IV helps ensure that older adults, caregivers, and communities throughout the region receive high-quality services that promote independence, dignity, health, and well-being. Area IV Subrecipient Monitoring Manual

Attachment 8B Customer Satisfaction Survey

Thank you for taking a few minutes to complete this survey. Your feedback helps us improve services for older adults and caregivers. Please answer the following questions based on services you received in the past 12 months. Your responses are confidential.

1. Who is completing this survey? (Check one)

- ☐ I am receiving the services.
- ☐ I am a family member or friend of someone receiving services.
- ☐ I am a caregiver for someone receiving services.
- ☐ Other:

2. Which county do you live in?

- ☐ Broadwater
- ☐ Gallatin
- ☐ Jefferson
- ☐ Lewis & Clark
- ☐ Meagher
- ☐ Park

3. Which service(s) did you receive? (Check all that apply)

- ☐ Information & Assistance
- ☐ Meals (Meals on Wheels/Congregate)
- ☐ Transportation
- ☐ In-home services
- ☐ Caregiver support
- ☐ Other: _____

4. How did you first contact us? (Check one)

- ☐ Phone
- ☐ In-person
- ☐ Email
- ☐ Referral from another agency or organization
- ☐ Our website
- ☐ Other: _____

Please indicate how much you agree with each statement by checking one box for each row.

Survey Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable
5. It was easy to reach someone for help.						
6. I was able to get the services I needed when I needed them.						
7. My preferences and needs were considered.						
8. The information I received was clear and easy to understand.						
9. Overall, I am satisfied with the services I received.						
10. The services I received met my needs.						
11. The services I received helped me continue living independently.						
12. I was treated with dignity and respect.						
Caregiver Support Questions (If you did not receive caregiver support, skip this section.)						
13. Caregiver services helped reduce my stress.						
14. I received useful information or training.						
Meal Services Questions (If you did not receive meals, skip this section.)						
15. The meals I received were of good quality.						
16. The meal service has been reliable.						
Transportation Questions (If you did not receive transportation, skip this section)						
17. The transportation I received was reliable.						
Information & Assistance (I&A) Questions (If you did not receive I&A, skip this section)						
18. The information I received was helpful.						
19. I was referred to other services that were helpful.						

20. **Did you experience any barriers to receiving services?**

☐ Yes (if yes, please check all that apply)

☐ No

If yes, which barriers did you experience? (Check all that apply.)

- ☐ Transportation
- ☐ Eligibility
- ☐ Scheduling
- ☐ Cost
- ☐ Language
- ☐ Location
- ☐ Time
- ☐ Other: _____

21. What did you like most about the services?

22. What could we do to improve our services?

23. Is there anything else you would like us to know?

Attachment 9A Direct Services Waiver Documentation

Direct Services Provided by Area Agencies

Section 307(a)(8)(A) of the Older Americans Act (OAA) generally prohibits State Units on Aging (SUAs) and Area Agencies on Aging (AAAs) from directly providing supportive services, nutrition services, or in-home services unless the SUA determines that one or more of the following conditions apply:

1. Direct provision is necessary to ensure an adequate supply of services.
2. The services are directly related to the administrative functions of the SUA or AAA.
3. The services can be provided more economically, with comparable quality, by the SUA or AAA.

Instructions:
If the AAA directly provides supportive services, nutrition services, or in-home services, please provide the following information for each service:

1. **Service Description:** Identify each service directly provided by the AAA and briefly describe the service and the population served.
2. **Justification for Direct Service Provision:** Identify which of the three conditions under Section 307(a)(8)(A) applies and explain why the AAA provides the service directly rather than contracting with a community-based provider. Include supporting data or documentation, such as provider availability, service capacity, cost comparisons, or other relevant information.
3. **Impact on Community Providers:** Explain how the AAA's direct provision of the service complements existing community services and does not unnecessarily duplicate or diminish services provided by other organizations.
4. **Organizational Structure and Service Delivery:** Briefly describe how the AAA organizes and delivers the service, including staffing, oversight, and methods of service delivery. Attach supporting documentation, if available.

If the AAA does not directly provide any services covered by this requirement, please indicate **"Not Applicable."**

The SUA will review the information provided and determine whether the justification for direct service provision meets the requirements of Section 307(a)(8)(A) of the OAA.

Please use the space provided below to respond to each item. Additional pages may be attached as needed to provide complete responses and supporting documentation.

Attachment 9B Emergency Preparedness Overview for Area IV

Emergency Preparedness

Area IV's Planning and Service Area is supported by county emergency management agencies, disaster and emergency services programs, public health departments, healthcare systems, law enforcement agencies, fire and emergency medical services, Local Emergency Planning Committees (LEPCs), and community partners that work collaboratively to prepare for, respond to, recover from, and mitigate the impacts of emergencies and disasters. Emergency preparedness efforts across the region emphasize mitigation, preparedness, response, and recovery activities designed to protect residents, maintain continuity of essential services, and strengthen community resilience.

Counties within Area IV maintain emergency operations plans, hazard mitigation strategies, public health preparedness programs, emergency communication systems, and coordinated response protocols addressing a variety of hazards, including wildfires, severe weather events, drought, flooding, hazardous materials incidents, public health emergencies, transportation accidents, and other natural or human-caused disasters. Emergency preparedness activities include public education, community notification systems, emergency planning, volunteer engagement, interagency coordination, evacuation planning, and community-based preparedness initiatives.

A common theme across the Planning and Service Area is the importance of collaboration among local governments, emergency responders, public health agencies, healthcare providers, community organizations, volunteers, and residents. LEPCs, emergency preparedness coalitions, community organizations active in disaster response, and other partnerships support coordinated planning, emergency communications, response activities, and disaster recovery efforts that strengthen local and regional resilience.

Given the predominantly rural and frontier nature of the Planning and Service Area, emergency preparedness efforts place particular emphasis on protecting vulnerable populations, including older adults, family caregivers, individuals with disabilities, veterans, Tribal members, and residents living in isolated or remote areas. Preparedness activities support access to emergency information, emergency notification systems, evacuation planning, continuity of services, disaster response coordination, and recovery assistance for individuals who may experience additional barriers during emergencies.

Area IV recognizes the importance of emergency preparedness in maintaining the health, safety, and independence of older adults. The Agency will continue to collaborate with county emergency management agencies, public health departments, senior centers, service providers, healthcare systems, and community organizations to support emergency planning, preparedness education, communication efforts, and coordinated response activities that help older adults and caregivers remain informed, connected, and supported before, during, and after emergency events. These coordinated efforts contribute to community resilience and support the ability of older adults to safely remain in their homes and communities during emergencies and disasters.