



# Area Plan Training: Parts 1 & 2

April 14, 2025



**DARS**

VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

**DIVISION FOR AGING SERVICES**

# AGENDA

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Area Plan Overview: Timeline & Process

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Area Plan Program: Part 1

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Area Plan Program: Part 2

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Area Plan Submission

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Wrap-Up

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# AREA PLAN OVERVIEW: What is the Area Plan?



# What Makes Up the Area Plan?



## 1. AREA PLAN PROGRAM

- Provides Background on the AAA
- Summarizes the PSA and Community Needs
- Identifies AAA Services to be Provided

## 2. AREA PLAN BUDGET

- Identifies Allocations for OAA and State-Funded Services

**Due  
August 1**

Most of the Area Plan content requirements are derived from the OAA statute and 45 CFR § 1321.65

# Area Plan Program Parts

- Available in the Portal as the Full Template or Part A/Part B

## Part A

Part 1: Background on the  
AAA

Part 2: Objectives &  
Strategies

## Part B

Part 3: Title III Services

Part 4: Title VII Services

Part 5: General Fund Services

Part 6: Other AAA Services

# Area Plan Budget

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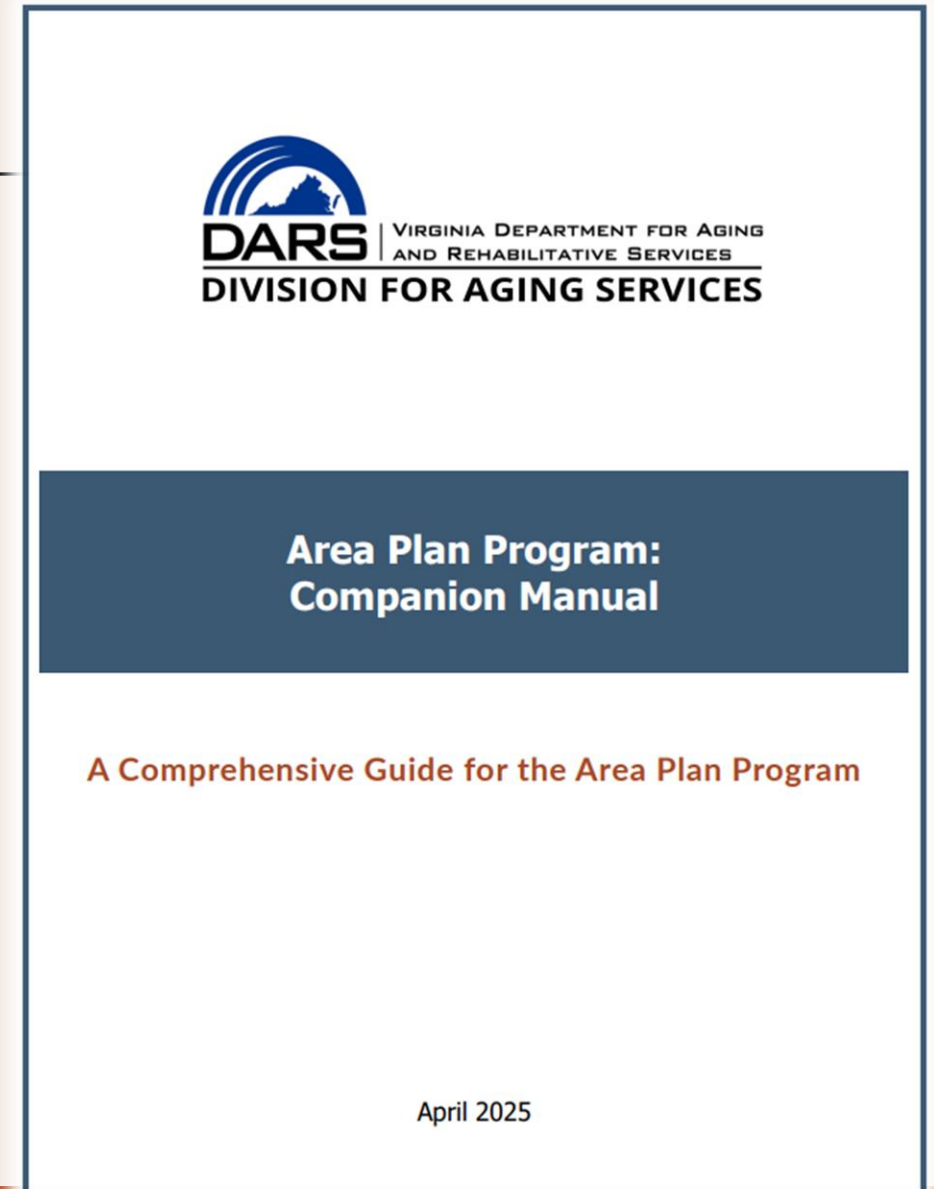
# Stay Tuned!



# AREA PLAN OVERVIEW: Rollout Timeline

# NEW: Companion Manual

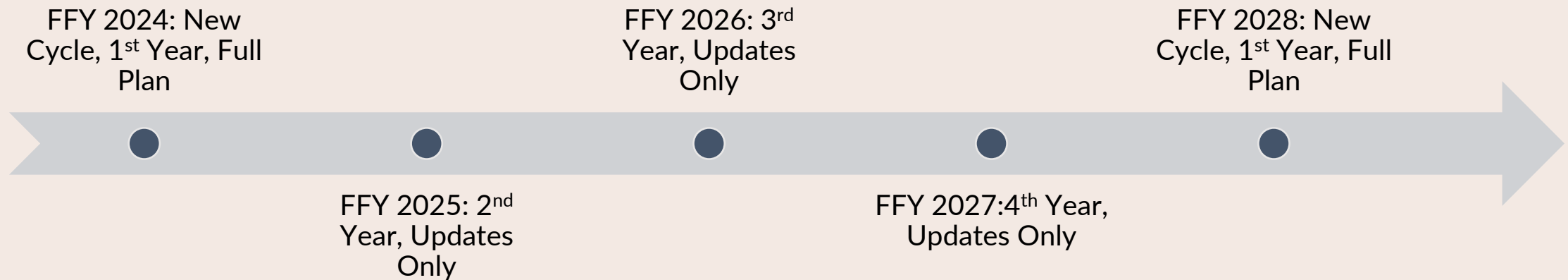
- Released and Posted in the Provider Portal on April 8, 2025
- DARS strongly recommends that AAAs review this as they are completing the Area Plan Program sections





# Usual Area Plan Process

- Run on a 4-Year Cycle
- 1<sup>st</sup> Plan Year: Full Plan (New DARS-AAA Contract)
- 2<sup>nd</sup> – 4<sup>th</sup> Plan Years: Updates (Contract Modifications)



# Adjusted Area Plan Process



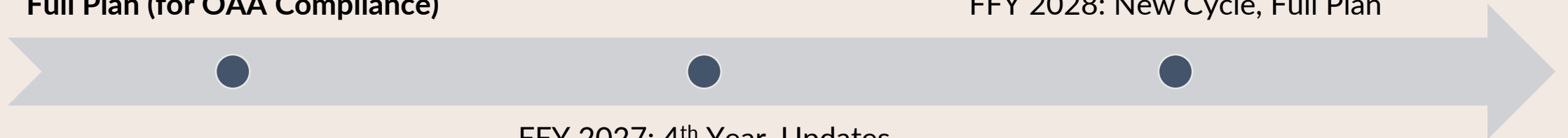
- In order to bring the Area Plan into compliance with the OAA Final Rule by October 1, 2025, there is an adjusted process this year



FFY 2026: 3<sup>rd</sup> Year,  
Full Plan (for OAA Compliance)

FFY 2028: New Cycle, Full Plan

FFY 2027: 4<sup>th</sup> Year, Updates  
Only



# Launching the New Area Plan

- March 14 Email Sent to Executive Directors and Seconds-in-Command
- Documents Found Under the Aging Services Provider Portal under Area Plan

## Distribution

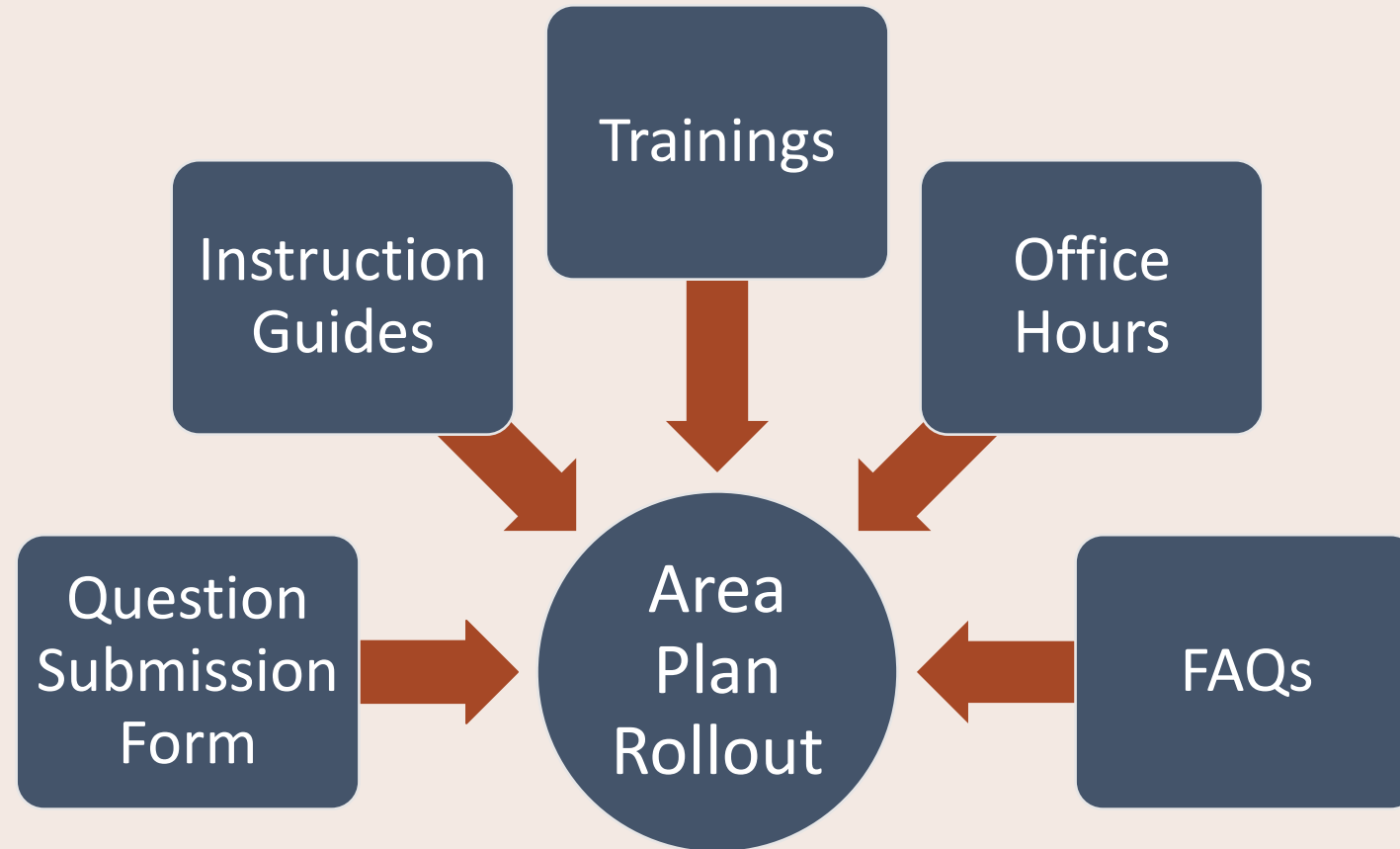


- Area Plan Program Template
- Area Plan Training Matrix
- Area Plan Training and Rollout Timeline
- Area Plan Training Summaries
- Microsoft Online Form to Submit Questions (Link)

## Documents



# Rollout Modalities



First FAQ was released on Friday!

# Area Plan Rollout Schedule



## March 14

- Release the Area Plan Program Template
- Open Link to a Microsoft Form for AAAs to Submit Questions to DARS
- Launch Links for Training Webinars and Zoom Meeting Office Hours

## April – May – June

- Release Area Plan Program Instruction Guide
- Host Area Plan Program Trainings
- Host Area Plan Program Office Hours

## June

- Release Area Plan Budget Instruction Guide
- Release Each AAA's Budget Allocations
- Host Area Plan Budget Training
- Host Area Plan Budget Office Hours

FAQs will be released periodically from April - June





# AREA PLAN OVERVIEW: Development Timeline Input & Approval Processes

# Public Input/Approval - 1



- 45 CFR § 1321.3: Periodic [means]:
  - “as used in this part to refer to the frequency of client assessment and data collection, means, at a minimum, once each fiscal year, and
  - as used in section 307(a)(4) of the Act (42 U.S.C. 3027(a)(4)) to refer to the frequency of evaluations of, and public hearings on, activities and projects carried out under State and area plans, means, at a minimum once each State or area plan cycle”

# Public Input/Approval - 2



- 45 CFR § 1321.65:
  - “(b)(4) State agency policies and procedures regarding Area Plan requirements will at a minimum address...
  - Public participation specifying mechanisms to obtain the periodic views of older individuals, family caregivers, service providers, and the public with a focus on those in greatest economic need and greatest social need, including:
    - (i) A reasonable minimum time period (at least 30 calendar days, unless a waiver is provided by the State agency during an emergency or when a time sensitive action is otherwise necessary) for public review and comment on **Area Plans** and **Area Plan Amendments**; and
    - (ii) Ensuring the documents noted in (b)(4)(i) of this section and final Area Plans and Amendments are accessible in a public location, as well as available in print by request.”

# Public Input/Approval - 3

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- DARS-AAA Contract:
  - “3.24 PUBLIC PARTICIPATION: The AAA shall develop and implement procedures for obtaining input from older individuals, officials of local government, the public, and other interested parties in the PSA on the needs of older individuals and on the Area Plan. The AAA shall give adequate public notice prior to conducting any public hearing for this purpose.”

# Public Input/Approval - 4



- The [DARS-OAS Grants Management Manual](#) (July 2018) requires the AAA to consult with the Advisory Council (p. 56)
- The [Board & Advisory Council Handbook for Virginia's Area Agencies on Aging](#) (December 2015) requires:
  - The AAA to consult with the AAA Advisory Council in developing the Area Plan (p. 13)
  - The AAA obtain Governing Board approval for the Area Plan Budget (p. 20) and overall Area Plan (p. 22)
  - The minutes for both should record a summary of any discussion held and outcomes of votes taken (p. 36)

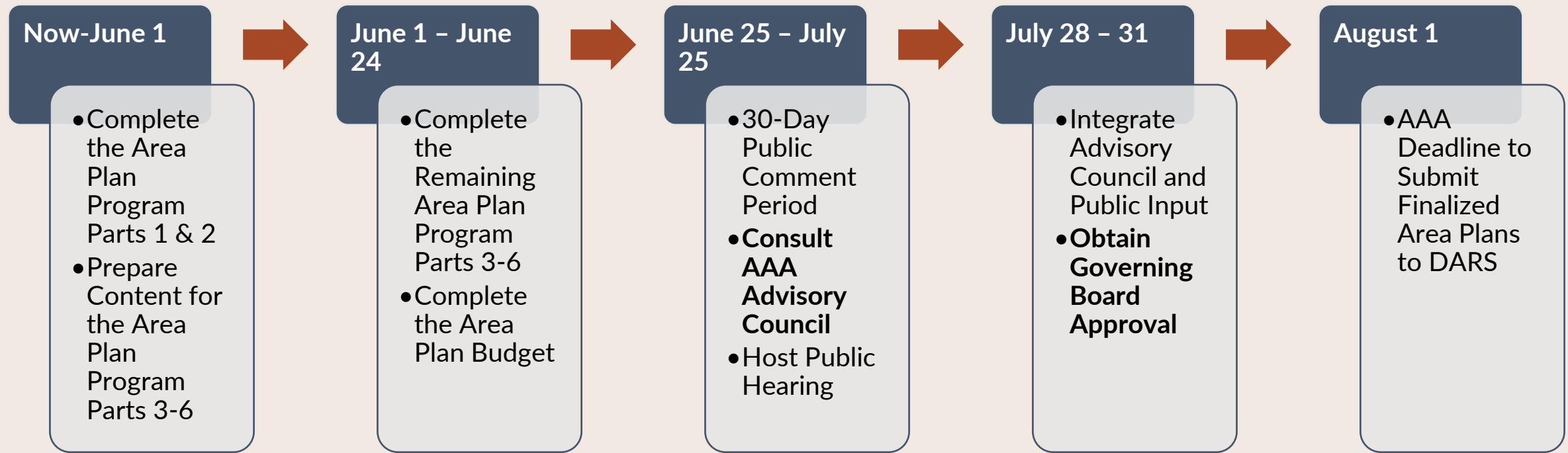




# AAA Area Plan Timeline



AAAs should follow the timeline outlined below to develop their Area Plans:



As you are planning ahead, consider if you need to adjust your Governing Board or Advisory Council meeting dates.

# Documents for Public Input



## Public Input: YES CORE Documents

- Area Plan Program (Parts A and B)
- Waiver Request Forms
- HDM-ID Transition Plan, if applicable
- Other Services Pages
- Area Plan Budget Sheets:
  - Summary
  - Requirements
  - Title III
  - Title III-E
  - III-E Grandparents

## No Public Input: NO\* ANCILLARY Documents

- Supporting Documents for Waiver Requests
  - Examples: HDM-ID Plan, RFPs, Meeting Minutes, Legal Assistance Entity Type documents
- Area Plan Budget Sheets:
  - CCEVP
  - Respite
  - FEDERAL
  - GENERAL 3-4
  - GENERAL 1-4
  - NSIP
  - DMAS OMB

\*NOTE: AAAs must make Ancillary Documents available for public inspection if there is a request for them

# Providing Public Notice



- DARS recommends AAAs provide public input notice about the 30-Day Public Comment Period and Public Hearing(s) at the same time
- AAA websites must have:
  - Public input notice information **AND**
  - A copy of the draft Area Plan documents or information about how the public can obtain copies of the Area Plan documents
- AAAs should use several appropriate methods for distributing the public input notice (e.g., social media, websites, local newspapers, flyers for clients, etc.)
- AAAs should consider specifically targeting current AAA clients for the public input notice
- If applicable, AAAs should also notify Title VI Grantees in overlapping service areas

# Collecting Public Input



## 30-Day Public Comment Period

- DARS recommends AAAs use these dates: June 25 - July 25
- AAAs should allow multiple (i.e., at least two) mechanisms to receive public input (e.g., email, mail, phone, fax) during the public comment period

## Public Hearing(s)

- AAAs must schedule at least one (1) public hearing
  - AAAs can have more than one hearing though
- Public hearings can be done in-person, virtual, or hybrid
  - AAAs should consider what is appropriate for their PSA
- Public hearings should be held within the first half of the public comment period
- AAAs should consider starting the public hearing with an overview presentation about the Area Plan for level-setting

# Public Input Recordkeeping



- AAAs must maintain a record of the public input
  - Log public comments
  - Record minutes for the public hearing(s)
- AAAs will need to integrate the outcomes of the public input solicitation into the Area Plan Program Part 1 prior to submitting a final Area Plan to DARS by August 1



# Consulting the Advisory Council



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**DIVISION FOR AGING SERVICES**

## Requirement

- After your AAA has developed a draft Area Plan, you need to seek input from the AAA Advisory Council (AC)
- The AC is not required to formally approve the Area Plan
- However, AC endorsements or other types of “approvals” can be offered and recorded

## Activities

- Provide AC members the Area Plan materials in advance of the AC meeting
- Present an overview of the Area Plan process, the AAA’s planned services, and any relevant rationale
- Consider opportunities to ask AC members questions about sections or decisions that the AAA would specifically like to get feedback on
- Take detailed minutes that capture AC member input on the Area Plan

## Outcomes

- AAAs need to integrate the outcomes of their AC consultations into the Area Plan Program Part 1 prior to submitting final Area Plans to DARS by August 1

# Getting Governing Board Approval



## Requirements

- Each AAA Governing Board (GB) must approve the AAA's Area Plan after the Advisory Council consultation and public input solicitation but before it is submitted to DARS
- DARS strongly recommends AAAs seek/receive the GB's approval between July 28-31 in order to meet the August 1 submission deadline to DARS\*

## Activities

- Provide the Area Plan materials to the GB members in advance of the meeting
- Consider starting the GB meeting by providing an overview presentation
- Share a summary of the Advisory Council's feedback and any public input received
- Ensure the meeting minutes reflect the GB's approval (checked on monitoring visits)

\*There is an allowable exception for Government-Sponsored AAAs. Please review the Companion Manual for more information.

# Just to Recap...

## DRAFT PLAN

June 25 – July 25

Concurrent Activities

30-Day Public Comment  
Period

Consult AAA Advisory  
Council

Host Public Hearing

1

## FINAL PLAN

July 28 – 31

Subsequent Activities

Integrate Advisory Council  
and Public Input

Obtain Governing Board  
Approval

2

3

\*Please review the Area Plan Program Companion Manual for additional information/instructions\*

# Public Access to Final Area Plans



- Once Area Plans have been approved by DARS and have taken effect, DARS expects AAAs to add the Area Plan Core Documents to their websites to ensure that Final Area Plans (and any future Final Area Plan Amendments) are accessible in a public location as well as available in print by request

## AAA Website Options:

1: AAAs can post the Area Plan Core Documents directly

2: AAAs can instruct the public how they can obtain a copy of the Area Plan Core Documents



# **AREA PLAN OVERVIEW: Annual Documents and Emergency Preparedness Tools**



# Other AAA Documents

## EMERGENCY PREPAREDNESS DOCUMENTS

- Continuity of Operations Plan (COOP)
- All-Hazards Risk Assessment
- All-Hazards Emergency Response Plan

**Due  
October  
1, 2025**

## ANNUALLY REQUIRED DOCUMENTS

- AAA Information Forms
- Key Staff, Governing Board & Advisory Council Information

**Due  
February  
1, 2026**

# Other AAA Documents Rollout



## DARS Rollout

- July 1: Release the Annual Documents and Emergency Preparedness Tools
- These documents are NOT subject to the Area Plan public input process

## July – August

- Host Annual Documents & Emergency Preparedness Tools Training
- Host Annual Documents & Emergency Preparedness Tools Office Hours

## October 1

- Emergency Preparedness Documents are due October 1 each year (starting in 2025)

## February 1

- AAA Annual Documents are due February 1 each year (starting in 2026)



**No Wrong Door Documents**

# No Wrong Door (NWD)



**BEFORE**



**NOW**

**THROUGH THE AREA PLAN**

- NWD Local Advisory Council Information (Members and Structure)
- NWD Local Standards (Matrix)

**THROUGH ANNUAL DOCUMENTS**

- For 2025: DARS will collect updated versions of the NWD documents in the spring/summer 2025 (exact dates TBD)
  - The End User Audit will also be part of this
  - Stay tuned for more information
- Starting in 2026: The NWD documents will be included in the Annually Required Documents that are due each year on February 1<sup>st</sup>



**AREA PLAN OVERVIEW:**  
**Any Questions So Far?**





# AREA PLAN PROGRAM: PART 1

# Part 1: Background of the AAA



VIRGINIA DEPARTMENT FOR AGING  
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**DIVISION FOR AGING SERVICES**

- This section of the Area Plan has the least number of changes from the previous version and the most reductions.
- Governing Board, Board Appointed Advisory Council, NWD Advisory Council, Organizational Chart and Staffing sections have been moved into the Annually Required Documents.
- This section of the Area Plan provides background information on Area Agencies on Aging (AAAs) in general, for members of the public, and includes fields to provide agency specific information.



# Page 4: Legal Name & Structure

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- The top of the page provides a brief overview of what an Area Agency on Aging is, its purpose and functions. This is intended for the public.
- Near the bottom of the page, there is a text field to enter the complete legal name of the agency, followed by four checkboxes to indicate the organization type of the AAA.

# AAA Legal Name & Structure



- These are the only items that need to be completed on this page.

The \_\_\_\_\_ is a

(Complete legal name of the agency)

- ☐ local government
- ☐ private nonprofit organization incorporated under the laws of Virginia
- ☐ joint exercise of powers organized pursuant to §15.2-1300 et seq. of the Code of Virginia
- ☐ multipurpose agency

# Page 5: Mission & Governance



## ■ Mission Statement:

- Enter the agency's **Mission Statement** at the top of page 5. This section allows the AAA to share its agency's mission and vision with the public.

## ■ Governance:

- This section has no fields to complete but includes the requirements to make certain documents related to the governance available for public inspection upon request. They are:
  1. **Governing Board Composition and Bylaws**
  2. **Advisory Council Composition and Bylaws**
  3. **Governing Board and Advisory Council Meetings, including Public Access**

# Page 5: Public Input

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- **Public Participation:**
  - State the process the agency used to receive public comment and review of the Area Plan and its amendments. Also describe how the AAA Advisory Council was consulted
  - Include the date of the public participation period and how the public input influenced the Area Plan process
  - Provide a brief description of these activities within the space allotted
- **The AAA will not fully complete this section until after the public input process is completed:**
  - For Draft Area Plans, AAAs should indicate their intentions and plans for the public input process
  - For Final Area Plans, AAAs should summarize the public input process that was used and how public input was considered in developing the Area Plan

# Page 6: Summary Source of Funds

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- **Summary Source of Funds:**
  - This is the last section in Part 1
  - The AAA must disclose all funding amounts and sources for the Fiscal Year
  - Funding is grouped by source type:
    - DARS (this includes all sources of funding passed through)
      - OAA
      - State General Funds
      - Other Grants (VICAP, Senior Cool Care, SFMNP, etc.)
    - Other State (DRPT, DMAS, DBHDS...)
    - Other Federal (AmeriCorps, CMS, Veterans Administration...)
    - Local Government (County/City funding)
    - Private (Foundations, Private Contracts, Commercial Relationships...)
    - Other (Contributions, Fees, Investments, Rental Income....)

# Page 6: Summary Source of Funds



- **NOTE:** These are estimated funds for Federal Fiscal Year (FFY) 2026 and may or may not be exact amounts for each funding source. DARS understands that there are factors at play, such as differences in federal and state fiscal years, funding sources that are not appropriated on an annual basis, and that the exact funding for upcoming year may not be known yet.
- The majority of potential funding sources have been prefilled, but the blank text fields at the bottom of each source section allows for further sources to be defined. The amount column on the right side of this table will automatically format numbers into [\$0,000.00].
- **Total Projected Revenues** at the bottom of the table will automatically total everything entered into the column.

# Page 6: Summary Source of Funds



VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

**DIVISION FOR AGING SERVICES**

<b>Estimated Funds for Fiscal Year 2026</b>	
<b>Source</b>	<b>Amount</b>
<b>Department for Aging and Rehabilitative Services</b>	
Older Americans Act (include Nutrition Services Incentive Program or NSIP)	
State General Funds	
Virginia Insurance Counseling and Assistance Program (VICAP); including State Health Insurance Assistance Program (SHIP) and Medicare Improvements for Patients and Providers (MIPPA)	
Respite Care Initiative	
Dominion Energy Senior Cool Care	
U.S. Dept. Of Agriculture – Senior Farmers Market Nutrition Program (USDA-SFMNP)	
Supplemental Nutrition Assistance Program (SNAP) Outreach	
Senior Community Service Employment Program (SCSEP)	
<b>Other State Government Sources</b>	





# AREA PLAN PROGRAM: PART 2

# Page 8:

## Populations of Greatest Needs

### PART 2: OBJECTIVES AND STRATEGIES

#### IDENTIFICATION OF POPULATIONS OF GREATEST NEED

Area Agencies on Aging (AAAs) must identify populations within their service areas who are at Greatest Economic Need (GEN) and Greatest Social Need (GSN) which should inform the Area Plan to improve service delivery, outreach and resource allocation.

Older Populations with Greatest Need	# of Older Individuals	Data Source(s)
<b>Greatest Economic Need (GEN)</b>		
At or below federal poverty		
Poverty as further defined by the state		
<b>Greatest Social Need (GSN)</b>		
Physical and mental disabilities		
Language barriers		
Cultural, social, or geographical isolation, including due to:		
Racial and ethnic status		
Native American identity		
Religious affiliation		
Sexual orientation		
Gender identity or sex characteristics		
HIV status		
Chronic conditions		
Housing instability		
Food insecurity		
Lack of access to reliable and clean water supply		
Lack of transportation		
Utility assistance needs		
Interpersonal safety concerns		
Rural location		
Any other status that threatens the capacity of the individual to live independently		

The OAA requires the AAAs to identify the Populations of Greatest Need in the respective PSAs

Row 2: “Poverty as further defined by the State” can be left blank

# Page 9:

## GE/SN Description



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- Using the Info on Page 8
- May include:
  - Description of demographic trends
  - Which populations the AAA may want to target for services and why
- Data Limitations

In reviewing the data above, provide a general description of the demographic characteristics of the planning and service area (PSA), with specific emphasis on populations of GEN and GSN. Note any data limitations.

# Page 10: Unmet Needs

Identify the source(s) of information or data on unmet needs and provide an overview of the information and data, including how that unmet needs information and data have informed the development of the Area Plan.

- Summarize the Unmet Needs data source/s
- Provide an overview of that info
- How did you use this info to inform your Area Plan?

# Page 11:

## Serving Low-Income Minorities



### SERVING LOW-INCOME MINORITY OBJECTIVES

With respect to the previous federal fiscal year, provide the following information:

Number of low-income minority individuals in the service area:

Describe the methods and objectives used to address their service needs.

Provide information on the extent to which the Area Agency on Aging met its objectives in the previous federal fiscal year to provide services to low-income minority individuals.

- Use previous data to inform
- How will you meet these specific needs?
- How did you meet objectives from the previous year?
  - Provide statistical data or other measurable outputs

# Page 12:

## Alignment with State Plan Goals



### ALIGNMENT WITH STATE PLAN GOALS

The [State Plan for Aging Services](#) (State Plan) establishes five goals for aging services in Virginia. Area Plans must be informed by the State Plan and align with the goals established:

- ☐ Unless otherwise stated, the Area Agency on Aging (AAA) confirms that the objectives of this Area Plan align with those in the State Plan.
- ☐ The AAA is creating separate goals and objectives that align with the State Plan and are outlined below:

### Two Choices:

- The AAA is in alignment with State Plan goals
- The AAA has created other goals but still align with the State Plan
  - Please briefly share those goals and objectives

### State Plan Goals:

1. Provide High Quality, Innovate Core OAA Programs
2. Deliver evidence-based programs that encourage healthy, active, and engaged lives
3. Promote access to aging and community services for older Virginians with the greatest economic and social needs
4. Bolster awareness of and increase access to person-centered long-term services and supports
5. Improve access to resources and services that support all caregivers

# Page 12:

## Objectives and Strategies



### Area Plan Development

- How did these separate elements coalesce into the Area Plan
  - We are especially looking at GS/EN, and outside input
  - You can reuse some language from above categories
- Your Draft Area Plan does not need to contain info about public input and the Advisory Council consultation
  - But these must be incorporated in Final Area Plan

#### HOW OBJECTIVES AND STRATEGIES INFORM THE AREA PLAN

Briefly describe how the unmet needs assessments, identification of populations of Greatest Economic Need (GEN) and Greatest Social Need (GSN), the State Plan for Aging Services, public participation in the development of this Area Plan, and Area Agency on Aging (AAA) Advisory Council input have informed this Area Plan.



# Page 13:

## Funding within the PSA



The AAAs are responsible for distributing *equitably* across the PSA

- How will resources be allocated to address the identified needs in each locality?
- Consider an equitable methodology for determining funding targets
- How did your GS/EN information inform your targets?

### FUNDING WITHIN THE PLANNING AND SERVICE AREA

For Area Agencies on Aging (AAA) that serve more than one locality (i.e. city or county) in Virginia:

Describe plans for how funding will be distributed **within** the planning and service area (PSA) in order to address populations of Great Economic Need (GEN) and Greatest Social Need (GSN).

Only AAAs that serve multiple localities (e.g., cities or counties) need to complete this section. AAAs that only serve one locality do NOT need to complete this section. The AAAs that do not need to complete this section are Alexandria City (8A), Arlington County (8B), and Loudoun County (8E).

# Page 14:

## Mental Health Coordination



Consider:

- Collaborations or partnerships focused on:
  - Local CSB or BHA
  - DBHDS initiatives
  - SUDs, risk reduction, or suicide prevention among older adults
  - serving individuals with ID/DD
- Information campaigns about CSB/BHA services and 9-8-8
- Any info showing referrals for AAA clients for CSB/BHA or other MH/BH services
- If the AAA is offering an evidence-based program with a MH/BH component or focus
- If the AAA offers individual counseling as a service under Title III-E

### SERVICE COORDINATION

The Older Americans Act details information that the Area Agency on Aging (AAA) must provide related to carrying out certain requirements within the Act. This section asks for information based on specific assurances contained within the Act that must be addressed by the AAA in its Area Plan.

**Describe how the AAA coordinates with mental health service organizations and agencies to increase public awareness of mental health disorders and remove barriers to diagnosis and treatment for older adults.**

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# Page 14:

## Assistive Tech Coordination



Describe how the AAA coordinates with the Virginia Assistive Technology System (VATS), the state assistive technology entity, to increase access to assistive technology options for older individuals.

Responses should consider:

- AAA efforts to provide access to and promote the use the VATS Social Health Kits that were developed through a partnership with No Wrong Door
- How the AAA increases awareness of VATS among AAA clients and caregivers
- How the AAA makes referrals to VATS for AAA clients and caregivers
- How the AAA increases awareness and makes referrals to the Foundation for Rehabilitation Equipment & Endowment (F.R.E.E.) for durable medical equipment (DME)
- Plans to partner or invite DARS VATS staff to present or provide information to AAA staff about VATS

# Page 15: Emergency Preparedness



## EMERGENCY PREPAREDNESS

Describe the Area Agency on Aging's (AAA) efforts to coordinate activities and develop long-term emergency preparedness plans with local and state emergency response agencies, relief organizations, and other institutions involved in disaster relief.

- Summarize the COOP and Emergency Preparedness Plans
- Include the date of the last update, or of pending updates, to the AAA's COOP, Emergency Plan, and Risk Assessment
- Identify the key partnerships the AAA has to prepare for potential emergencies
- Describe efforts to coordinate with any Title VI Grantees in the PSA\*

Please **DO NOT** include your entire COOP, Risk Assessment, Emergency Plan. The completed documents will be required through the Annual Documents. The response in the Area Plan should be limited to 1 page.

\*If you do not have a Title VI Grantee entity overlapping in your PSA, you do not need to add that information

# Page 16:

## Serving Older Native Americans



### SERVING OLDER NATIVE AMERICANS

For Area Agencies on Aging (AAA) that have an Older Americans Act (OAA) Title VI Grantee in the planning and service area (PSA):

Describe the coordination efforts between the AAA and the Tribal Organizations on outreach activities to inform older Native Americans about OAA services and increase service access and provision.

This section requests a summary narrative of the Policy and Procedures document developed by the AAA

- How the AAA's network, including service providers, will provide outreach to Tribal elders and family caregivers
- How the AAAs will provide this population with:
  - Title III and other funding opportunities
  - Technical assistance on how to apply for Title III and other funding opportunities
  - Meetings, email distribution lists, presentations, and public hearings
- Program information and changes, including coordination with service providers
- How Title VI programs may refer individuals who are eligible for Title III services
- How services will be provided in a culturally appropriate and trauma-informed manner



AAAs without an overlapping Title VI grantee may skip this page

# Pages 17 & 18: Services to be Provided

- Put an X in the box:
  - Service Provided
  - Funding Source
- Should match your AP Budget
- Grey boxes are not eligible under those funding sources
- Pre-filled “X”s for services most AAAs are providing\*

## SERVICES TO BE PROVIDED:

Indicate which programs the Area Agency on Aging (AAA) provides with Older Americans Act (OAA) funding by checking the corresponding boxes under Title III Funding Source or with state funding by checking the corresponding box under State General Funds (GF). The funding sources indicated on this page should align with the Area Plan Budget that is submitted to DARS. Not all sources listed on the Area Plan budget, such as fees and voluntary contributions are included on this page. Some services can only be funded with specific titles of the OAA or with State General Fund (GF); shaded sections in this table indicate a specific program cannot be funded with that specific source. Some required services have been pre-checked. Programs or services marked with OAA funding on this page must have a corresponding service page in Part 3.

Area Plan Services	Title III Funding Source					
Title III Services	B	C1	C2	D	E	State GF
<b>Group 1: In-Home</b>						
Adult Day Care						
Checking						
Chore						
Homemaker						
Personal Care						
<b>Group 2: Access</b>						
Care Coordination						
Care Transitions						
Communication, Referral, Information & Assistance	X					
Options Counseling						
Transportation	X					
Assisted Transportation						
<b>Group 3: Legal Assistance</b>						
Legal Assistance	X					
<b>Group 4: Other Services</b>						
Assistive Technology/Durable Medical Equipment (DMF)/Personal Emergency Response System						

\*There may be rare instances where those services are not provided, but you may un-check the box

# Pages 18: Hunger & Isolation Prompt



Box 1: Which services address:

- Hunger
- Food insecurity
- Malnutrition
- Social Isolation
- Physical and MH conditions

List or Narrative: Identify/Describe those services that apply to each category

Area Plans must incorporate services which address incidents of hunger, food insecurity, and malnutrition; social isolation and physical and mental health conditions. Briefly describe which services the Area Agency on Aging (AAA) will provide that address those.

**Some services may address multiple priorities. Please include them in the description of each priority.**



# Pages 18: Self-Direction

Area Plans, to the extent feasible, must provide for the furnishing of services under the Older Americans Act (OAA) through self-direction. List the relevant services the AAA will provide through self-direction, if any. If none, indicate that.

**Self-directed – model of service delivery where the client determines how, when, and from whom services and supports are provided. The opposite of “agency-directed”.**

Box 2: Self-Direction. List any services provided through self-direction.

Examples of services\* that should be self-directed:

- personal care
- homemaker
- respite care

If there are none, please indicate.

\*Options Counseling should not be included on this list, but should be included on other services pages

# Page 19: Other Services



- Indicate any of the services that will be provided
- If there are other services not listed, there are a few blank spaces to fill in
- Additional Other Services Pages, if needed, are on the Provider's Portal
- All services indicated on this page must also have an Other Service Page in part 6 of the Area Plan\*

Complete this section for all other services that the Area Agency on Aging (AAA) provides that are not funded through the Older Americans Act (OAA) Title III. Programs and services marked on this page must have a corresponding service page completed in Part 6. If additional service pages are needed for this section, they can be found on the [VDA Providers Portal](#).

Other AAA Services	Providing Service
Adult Day Center	
Certified Application Counselors	
Care Transitions	
Community Action Agency (CAA)	
DRPT Transportation	
Emergency Services	
Foster Grandparents	
Home Repair/Modification	
U.S. Housing and Urban Development (HUD) Housing	
Low Income Home Energy Assistance Program (LIHEAP)	
Managed Care Services	
Medicaid Transportation	
Options Counseling	
Program for All-Inclusive Care for the Elderly (PACE)	
Virginia Public Guardianship & Conservator Program	
Retired Senior Volunteer Program (RSVP)	
Senior Community Service Employment Program (SCSEP; OAA Title V)	
Senior Companions	
Senior Cool Care	
Senior Farmers' Market Nutrition Program	
Senior Medicare Patrol	
Supplemental Nutrition Assistance Program (SNAP) Benefit Counseling	
Virginia Insurance Counseling and Assistance Program (VICAP)	
Weatherization	

\*There are only 2 blank pages in the Area Plan Program Template in Part 6. Additional blank Other Services Pages are available for download in the Provider's Portal.

# Pages 20-24: Waivers

- Minimum Adequate Proportion
- Cost Sharing
- Alternative Fee Scale
- Direct Service



# Page 20:

## Minimum Adequate Proportion (MAP)



- AAAs must complete a 30-day public comment period
- Must complete at least 1 public hearing
- All comments must be documented and submitted to the SUA with the AP and waiver request
- Must include the date of public hearing
- Justification for waiver request – must be a compelling case
- May provide supporting documentation

Public hearings for the MAP Waiver may coincide with the Area Plan public hearings\*

### Public Hearing Requirement for MAP Waiver Requests:

Before an Area Agency on Aging (AAA) requests a MAP Waiver, it must conduct a public hearing as follows:

1. The AAA must notify all interested parties about the public hearing.
2. Interested individuals must be given an opportunity to provide input at the public hearing.
3. The AAA must accept written comments from interested parties for 30 days
4. The AAA must submit a complete record of the public comments along with the MAP Waiver request to DARS.

### Indicate which service category a MAP Waiver is requested:

	<b>15% Access Services</b> – defined by the OAA, Section 306(a)(2)(A) as care coordination, communication, referral, information and assistance (CRIA) and transportation.
	<b>5% In-Home Services</b> – defined by the OAA, Section 102(30) as adult day care, checking, chore, homemaker, personal care and residential repair and renovation.
	<b>1% Legal Assistance</b> – defined by the OAA, Section 102(33) as legal advice and representation provided by an attorney including counseling or other assistance by a paralegal or law student supervised by an attorney or counseling or representation by a nonlawyer, where permitted by law.

Public Hearing Date: \_\_\_\_\_

Provide justification that demonstrates support for this MAP Waiver request. Submit a complete record of the public comments and any supporting documentation for review:

\*MAP waiver must be specifically called out during the notice for public comment and public hearing

# Page 20:

## MAP Public Input Requirements



1. The AAA must notify all interested parties about the Public Hearing (This includes the AAA's Governing Board and Advisory Council)
2. MAP Waiver must be specifically called out in the public notice for the Public Hearing
3. The AAA must give interested individuals an opportunity to provide input at the Public Hearing
4. The AAA must accept written comments from the public for 30 days
5. The public notice structure should follow comparable instructions as provided for the 30-Day Public Comment Period held for the AAA Draft Area Plan
6. The AAA's request for a MAP Waiver must be specifically called out in the public notice for the 30-Day Public Comment Period.
7. The AAA must submit a complete record of the public comments along with the MAP Waiver request to DARS. This includes written comments provided during the 30-Day Public Comment period and any received through the AAA's Public Hearing.

Supporting documents that you might include or send to DARS with the AP to make your justification do not need to be published for the public comment or public hearing

Additional information is included in the Companion Manual

# Page 21: Cost Sharing Waiver



The Area Agency on Aging requests a Cost Sharing Waiver:

For all services allowed by the OAA

For one or more specific services identified below

Using the space below: (1) identify the specific services the AAA is requesting a Cost Sharing Waiver for, if applicable; and (2) provide the reason(s) for the Cost Sharing Waiver request, including a detailed explanation that adequately demonstrates the need for a Cost Sharing Waiver. Submit any supporting documentation for review.

AAAs must cost share for applicable programs unless:

- A significant proportion of persons receiving services under the OAA have incomes below the threshold established in DARS policy
- Cost sharing would be an unreasonable administrative or financial burden upon the AAA

Programs funded solely by State GF\* must continue to cost share

Supporting documentation:

- Data that reflects the proportion of the AAA's total clients are considered low-income
- Reports or expenses that outline the administrative costs associated with implementing cost sharing

\*funds that are not used as OAA match funds

# Page 22:

## Alternative Fee Scale Waiver



- Check the box
- Name the service(s)
- Provide justification
  - Board Approval/Review Dates
  - Current Funding Source for Requested Services
- Submit the proposed Alternative Fee Scale

<input type="checkbox"/>	The AAA requests an Alternative Fee Scale Waiver
--------------------------	--

State the service(s) that an Alternative Fee Scale Waiver is being requested:

Provide justification and rationale for the Alternative Fee Scale Waiver request. State if it has been approved by the governing board, when that occurred and/or when the Alternative Fee Scale was last reviewed by the governing board and the current funding source for the service(s). Submit the AAA's proposed Alternative Fee Scale for review.

Virginia cannot permit cost sharing by a low-income older individual if the income of such individual is at or below the ***Federal Poverty Line (FPL)***



# Pages 23 & 24: Direct Service Waiver



- Use a new page for each service
- Using the Drop Down, select the requested service
- Check the box(es) giving reason for the request
- Describe justification
  - Efforts made to locate providers
  - Cost of service estimates
  - Other descriptions or info for consideration

## DIRECT SERVICE WAIVER FORM

The Area Agency on Aging (AAA) requests a Direct Service Waiver for:

Select from Drop Down

Reason for the Direct Service Waiver request (check all that apply):

<input type="checkbox"/>	Providing services by the AAA is necessary to assure an adequate supply
<input type="checkbox"/>	Services are directly related to the AAA's administrative functions
<input type="checkbox"/>	Services can be provided more economically, and with comparable quality, by the AAA

Provide justification for this request. Include any efforts the AAA made to locate a service provider, details regarding the costs of services in the planning and service area (PSA) and any other information relevant for consideration. Include information regarding governing board review and approval. All records related to this request must be maintained for monitoring purposes.

Additional blank pages are available on the  
Provider's Portal

# Pages 23 & 24: Direct Service Waiver



In Part 3 – Description of Services  
Check the box indicating request for  
a Direct Service Waiver

Direct Service Waiver forms\* are  
not needed for Care Coordination,  
PIE, and CRIA

Service: Homemaker					Direct Service Waiver	
Unit Type	Hours	Total Units		People Served	Yes	No
Proposed Expenditure Amount		Funding Source			Match Funding	
		Title III-B				
		Title III-E				
		General Fund- OAA General			X	
		General Fund- Community Based			X	
		Voluntary Contributions				
		Fees				

Additional blank pages are available on the  
Provider's Portal

\*AAAs should ensure that "Yes" is checked under the  
direct service waiver portion of the Service Pages for  
Care Coordination, CRIA, and PIE (Part 3)

# Pages 23 & 24: Direct Service Waiver



Successful Waiver Requests Will Address One or More of the Following:





1. **Necessity**: If direct service provision fills a regional service gap. Documentation should include service availability, provider capacity, and geographic coverage.
2. **Administrative Function**: If the services in question are closely linked to the AAA's core administrative responsibilities.
3. **Cost-effectiveness**: Comparison of AAA service delivery versus service provider contracting, assessing efficiency and quality.



# AREA PLAN SUBMISSION

# Document Submission

- There are 4 folders for you to upload documents
- Please upload them as appropriate based on the folder title
- Submitted documents should be either PDF or Excel formats.

	Annual Documents
	Emergency Preparedness Docs
	FY26 Area Plan Documents
	NWD Documents

**\*\*\*Please do not merge your various documents together.**

**The formatting *will* come undone, and we *will not* be able to view your entire document.\*\*\***

# Document Submission



## Naming Conventions or What to Call Your Files

Please submit as your PSA number and the document attached.

Examples:

AP Program PSA 05 – Part A.pdf

AP Program PSA 05 – HDM-IDwaiver.pdf

AP Program PSA 05.xlsx

If you are working on a document, meaning it is not completed, but it is in your folder, please indicate “DRAFT” following the Program.

Once completed, simply rename the document and remove the “DRAFT”

Example:

AP Program PSA 05 – Checking\_DRAFT



# Document Submission

- AAA Information Forms
- Key Staff Document
- Governing Board Information
- Advisory Council Information



Annual Documents





# Document Submission



Emergency Preparedness Docs

- Emergency Response Plans
- Training and Exercises
- Community Outreach



- Education
- Hazard Assessments
- Infrastructure Improvements

- Life Safety
- Incident Stabilization
- Property Preservation
- Evacuation & Mass Care

- Economic Recovery
- Debris Management
- Housing
- Health/Social Services

- Continuity of Operations Plan (COOP)
- All-Hazards Risk Assessment
- All-Hazards Emergency Response Plan

# Document Submission



- All Documents for AP Program Parts A and B should be included in this folder
- Waivers, Supporting Documents, and Other Services Pages will be included here in sub-folders\*
- Area Plan Budgets will also go here



FY26 Area Plan Documents

We will add two sub-folders titled:

1. "Waivers and Supporting Docs"
2. "Other Services Pages"

Put your respective documents in their sub-folders.

# Document Submission



NWD Documents

- NWD Local Advisory Council Information (Members and Structure)
- NWD Local Standards (Matrix)



More information about this will be relayed by the DARS NWD Team in the near future.

# Document Submission



If you have waivers, please place them in the folder titled “Waivers and Supporting Docs” and include those documents there. You should name the waivers as discussed in previous slides.



**WRAP-UP**

# Wrap-Up

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- April and May is a good time to start working on:
  - Completing Area Plan Program Parts 1 and 2
  - Sketching out narrative content for services in Parts 3-6
  - Scheduling Advisory Council consultations and public input processes on the Area Plan, and the meeting to secure Governing Board Area Plan approval
- Join us for Office Hours on Area Plan Program Parts 1 and 2:
  - No planned programming; AAAs can ask questions & get feedback
  - Mon. April 21, 2025 from 10-11:30 AM
  - [Link](#) to join
  - No registration is required
- Additional Area Plan Office Hours are also scheduled for June 3, 16 and 23

