



**JEB BUSH**  
GOVERNOR

**TERRY F. WHITE**  
SECRETARY

## MEMORANDUM

**TO:** AAA Executive Directors **NOTICE#:** 050704-1-T-PE

**FROM:** Horacio Soberon-Ferrer, Research Coordinator  
Planning and Evaluation Unit

**DATE:** May 7, 2004

**SUBJECT:** **Notice of Transmittal:** Preliminary Information for FFY 2005  
Area Plan Development

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The purpose of this Notice of Transmittal is to give advance notice of the changes proposed in the area plan requirements for Federal Fiscal Year 2005, which marks the start of another three-year planning cycle.

To assist with the requirement for an expanded needs assessment and detailed targeting plan, the Department will be providing additional tools for the Area Agencies on Aging. By the middle of May, the Department will release the statewide and PSA-specific results from last year's needs assessment survey. In addition, county-level maps of high need areas and demographic profiles will be available.

As a companion activity, the Planning and Evaluation Unit will be hosting a meeting to review the needs assessment results on May 21<sup>st</sup> from 10 a.m. to 12 noon in Conference Room #225F at the Department of Elder Affairs. Participation by conference call will be available for those who cannot attend. The "meet-me" teleconference number is (850) 921-5551 or SunCom 291-5551.

AAAs should also conduct local activities to identify unmet needs, such as review Elder Helpline data, hold focus groups/public hearings, analyze other needs assessment data available in the community and results of efforts to bid services.

Since FFY 2005 begins a three-year planning cycle, the Direct Service Waivers must be requested again. To accommodate the Department's approval process, the waiver request will be due in mid-August so that the approved waiver can be included in the area plan submitted in mid-November. Appropriate justification for the necessity of providing the service directly will be required for approval.

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To adequately justify the direct delivery of services, a public hearing must be held. The AAA must document when and where the public hearing was held and provide a summary of the public comments specific to the services proposed for direct service provision. It should be clearly documented that participants were made aware of the AAA's intention to directly provide the service(s).

In addition, the Area Agency must include justification based on one or more of the following methods:

1. If cost analysis or needs assessment is used, it must be recent, include data specific to the direct services being proposed, and properly document the request for a waiver.
2. If a provider for the proposed direct service has been solicited through a Request for Information (RFI) or Invitation to Bid (ITB), the RFI or ITB must have been recent and designed to allow for competitive responses.
3. If the service is considered part of the administrative activity, the rationale and authority for this determination must be provided.

The FFY 2005 Area Plans will be required to address the four program goals identified in the Aging Strategic Plan released by the Administration on Aging in November 2002 (<http://www.aoa.gov/about/strategic/strategic.asp>):

1. Increase the number of older people who have access to an integrated array of health and social supports
2. Increase the number of older people who stay active and healthy
3. Increase the number of families who are supported in their efforts to care for their loved ones at home and in the community
4. Increase the number of older people who benefit from programs that protect their rights and prevent elder abuse, neglect and exploitation

The FFY 2005 Area Plans will also be required to incorporate the new DOEA planning priorities, which will be included in the DOEA Long-Range Program Plan, due for release in August 2004:

1. Create a long-term care system that is streamlined, cost-effective and consumer-friendly
2. Create a greater support network for elders, families and caregivers
3. Create an elder-friendly environment that values the contributions and needs of elders

In addition, the area plans will be expected to provide a budget narrative that ties expenditures to the program goals of the Administration on Aging and the planning priorities of the Department of Elder Affairs. Also, the plans should address cultural and ethnic issues related to providing services to elders in their planning and service area.

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The following dates represent the proposed time line for this year's planning cycle:

<b>Tentative Dates</b>	<b>Activities</b>
mid-May	Release of results from statewide needs assessment survey, county-level GIS maps of high need areas, county demographic profiles
late May	Meeting on statewide needs assessment survey and Direct Service Waiver
early July	Draft Area Plan instructions to be released
mid-summer	Area Plan Training (proposed to be held jointly with fiscal officers training)
mid-August	Deadline for Direct Service Waiver requests to be submitted
mid-November	Completed FFY 2005 Area Plans are due

Should you have questions about the development of the FFY 2005 Area Plans, please contact the Operations and Management Consultant Manager for your area. Your continued assistance with the planning process is greatly appreciated.

HSF/sls

cc: Contract Management Unit