

*Administration Office*

*Rogue Valley Council of Governments*

*Senior and Disability Services*

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# **AREA PLAN**

## **2021-2024**



**SENIOR AND DISABILITY SERVICES OF THE  
 ROGUE VALLEY COUNCIL OF GOVERNMENTS  
 AREA AGENCY ON AGING  
 2021-2024 AREA PLAN**

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SECTION A - AREA AGENCY PLANNING AND PRIORITIES



## A - 1 Introduction:

The Rogue Valley Council of Governments (RVCOG) has been the designated Older Americans Act Area Agency on Aging (AAA) for Jackson and Josephine Counties since 1974. The RVCOG is a voluntary association of local governments including Jackson County, Josephine County, all thirteen municipalities located within the two-county area, and representatives from higher education and several special districts.

The RVCOG Senior and Disability Services (SDS) serves Josephine and Jackson Counties with a total population exceeding 308,000. The region includes two Census-designated urbanized areas, one centered on the City of Medford, and the other on the City of Grants Pass.

Senior and Disability Services, including the Senior Nutrition Program (Food & Friends, now its own department), is RVCOG's largest program offering, with an annual budget of approximately \$5.5 million and 24.9 full and part-time staff. Please note that for the purposes of this Area Plan, RVCOG SDS will be used to refer to both the SDS and Senior Nutrition departments unless otherwise noted.

The RVCOG SDS, under an Intergovernmental Agreement with the State, partners with the Medicaid Long-Term Care and Financial Assistance programs, which are directly provided by District 8 Aging and People with Disabilities (APD). District 8 APD services are delivered from three sites including a Senior Services site in Medford, a Disability Services site in Medford, and a site providing combined services in Grants Pass. Services include SNAP, medical coverage, medical supplies, Adult Foster Care licensing, Adult Protective Services, and eligibility and case management for clients enrolled in Medicaid Long Term Services and Supports (LTSS).

RVCOG SDS and APD's goal is to provide a seamless service system to seniors and people with disabilities in the two-county area. Towards this goal, service descriptions for both RVCOG SDS and APD are included in this plan. This four-year Area Plan describes APD Services as well as those provided by RVCOG SDS to give a comprehensive understanding of services for seniors and disabled adults.

RVCOG SDS is the certified Aging and Disability Resource Connection (ADRC) for the two-county area and provides Oregon Project Independence (OPI) services, a nutrition program (Food & Friends), family caregiver support, health promotion/prevention programs, behavioral health services, advocacy and program coordination/development services.

This four-year plan has been developed to ensure that our organization has provided the opportunity for community input concerning senior and disability services in Jackson and Josephine Counties. This provides us with a better understanding of the needs of our community, and assists us in prioritizing our services, based on those needs deemed most important by community members.

A copy of the 2021-2024 Four-Year Area Plan is available for public review at the Senior and Disability Services of Rogue Valley Council of Governments program office, 155 North First Street, Central Point, Oregon 97502; Phone (541) 423-1384; Fax (541) 664-7927; and on the Web at [www.RVCOG SDS.org](http://www.RVCOG SDS.org).

A - 2 Mission, Vision, Values:

RVCOG SDS Mission:

**“Together we promote the dignity, quality of life, and self-determination of seniors and people with disabilities.”**



RVCOG SDS Values:

- We support the dignity, quality of life and independence of people as they age or experience disabilities.
- We empower individuals and families to help themselves by providing information and resources to all, so that they have choices.
- We respect each person's uniqueness and understand that well-being encompasses physical, social, financial, mental and emotional health needs that can change and evolve.
- We empower caregivers to be knowledgeable and have the skills to provide quality care and thrive while providing care.
- We protect and intervene for people as they age and for people with disabilities so that they are free from emotional, physical, and financial abuse.
- We promote our communities' preparation for and support of long-term services and supports.
- We believe all people have the right to be free from discrimination, particularly, of a sexual orientation, gender identity, gender expression, racial, ethnic, age, religious, or disability-related nature.

We provide a financially and programmatically-sustainable service system.

This Area Plan reflects an outcome-based approach embraced by the RVCOG SDS. Service descriptions within this Area Plan are organized into the following general areas (see Section B-3 Services and Administration for more detail).

- Administration, Program Coordination and Development** – Provide efficient and competent administration, program coordination and development.
- Advocacy and Advisory Councils** – Serve as a voice for the aging and people with disabilities in the Jackson and Josephine Counties area.



- **Behavioral Health** – Provide resources and services that help provide a better quality of life.
- **Community Living** – Enable consumers to understand the range of home and community-based residential care options including information about financial assistance.
- **Emergency Preparedness** – Connect vulnerable people to the Disaster Registry.
- **Family Caregiver Support and Training** – Provide access to a range of services to support family caregivers.
- **Federal Assistance Programs for Seniors and People with Disabilities** – Partner with the locally-available Medicaid Long-Term Care and Financial Assistance Programs, Aging and People with Disabilities (APD).
- **Health Promotion Programs** – Provide services that maintain or empower health including services for those with chronic conditions and diabetes.
- **Information and Expert Help** – Provide knowledge or resources for aging and disabilities.
- **Lifelong Housing Certification** – Provide information about the Rogue Valley Council of Government’s Lifelong Housing Certification Project, a voluntary certification process for evaluating the accessibility and/or adaptability of homes.
- **Nutrition** - Food & Friends Senior Meal Program and Meals on Wheels
- **Safety and Rights** – Provide tools to protect aging individuals and individuals with disabilities from harm or abuse.

### A - 3 Planning and Review Process:

In general, the agency sees there will be an increased need for the services that RVCOG SDS provides in the next 20 years, both due to in-migration and a demographic of citizens who are progressively aging as well as an increased population of adults with disabilities.

The reasons for this growing demographic are multiple, but subjectively one can attribute the increase in the senior numbers to the aging of the Boomer generation combined with increased immigration due to the popularity of Southern Oregon as a retirement destination. Additionally, the number of younger people with disabilities is increasing, due to advances in medical technology that contribute to a higher survival rate of severely injured individuals and people with disabling chronic conditions. Finally, increasing life span is contributing to a greater frequency of age-related chronic conditions, many of which eventually lead to individuals requiring assistance with activities of daily living.

The Senior Advisory Council, in partnership with RVCOG SDS staff, played a key role in the Four-Year Area Plan process.

The following is a list of the 2021-2024 Four-Year Area Plan activities completed:

- Utilized a Four-Year Area Plan Workgroup comprised of SAC and staff members to write the plan.
- Reviewed and updated the AAA's mission and values statements with the Senior Advisory Council Executive Committee.
- Developed, implemented, and analyzed a survey of seniors and individuals with disabilities in Jackson and Josephine counties. The purpose of the survey was to better understand what services seniors need to ensure that those facing aging or disability issues, or those caring for persons with such issues, are able to live as independently as possible. A total of 745 survey

forms were completed, of which 616 contained usable data. The respondents completed the survey by either filling the forms by pencil or pen, or entering responses into the survey form on the SurveyMonkey website. The survey period was October 2019 to May 2020. The data was collected to describe the demographic characteristics of the respondents, their current living conditions, the state of their health, sources of health information and support, and needs for assistance and services. The resulting report is available as Appendix H.

- Conducted interviews with key stakeholders, including: AARP, Addus Homecare, Allcare Coordinated Care Organization, Ashland Senior Center, At Home Senior Solutions, Columbia Care, Providence Medical Group - Eagle Point, Senior Options, Jackson County Housing Authority, Jackson County Library, Jackson County Mental Health, LaClinica, Center for Non-Profit Legal Services, Medford Senior Center, OLLI - Osher Lifelong Learning Institute, Power of the Heart Dementia Care, Rogue River Assembly of God, Rollins Family Health, Valley Lift RVTD, SONAR - Southern Oregon Networking and Resource, Asante Three Rivers, Veteran's Affairs, and Valley Evangelical Church.
- From the gathered survey and stakeholder data, the agency identified the following list of needs (not prioritized):
  - Address loneliness
  - Assist seniors to move through legal, financial, and government program challenges
  - Encourage all health care providers to accept Medicare
  - Focus on addressing fear of memory loss and dependency on others
  - Increase access to dental, eye, and alternative health care
  - Increase awareness of Disaster Registry
  - Increase community awareness of Aging and Disability Resource Connection (ADRC)
  - Provide affordable, accessible housing
  - Provide help to make home repairs and/or modifications
  - Provide in-home services
  - Research and plan for people who are about to turn 60 who are not prepared for aging

- Strengthen public and private transportation system
- Conducted a public meeting to develop future Title IIIB discretionary funding priorities.
- The agency conducted a public hearing on November 2, 2020 to review and gather public and Senior Advisory Council feedback on the Four-Year Area Plan.

## A - 4 Prioritization of Discretionary Funding:

Very little of RVCOG SDS's OAA Title III B funding budgeted for FY 2021 activities is available for discretionary activities. Most of the funding (\$483,760) is utilized to meet federal priorities including:

- Access Services - Transportation, ADRC Information & Assistance, ADRC Person-Centered Options Counseling, Preventive Screening, Counseling, and Referral
- Administration
- Advocacy
- In-home Services - Respite
- Legal Services
- Program Coordination & Development – Include such activities as new revenue development, Disaster Registry and Lifelong Housing activities, coordination with local groups/organizations/services providers targeting LGBTQ+, Native American, homeless, low-income, and at risk elders and adults with physical disabilities.

For FY 2021, the agency is utilizing \$92,112 of Title IIIB discretionary funding for the following activities:

- Guardianship/Conservatorship Service
- Behavioral Health services including:
  - Age Wise, Age Well Senior Peer Counselor Program
  - Program to Encourage Active and Rewarding Lives for Seniors (PEARLS)
  - Older Adult Behavioral Health Specialist activities

A public meeting was held on August 24, 2020 to develop future Title IIIB discretionary funding priorities. The meeting was attended by 28 people including members from the Senior Advisory Council and Disability Services Advisory

Council and a variety of public and private partners including Aging and People with Disabilities of Jackson and Josephine Counties, State Community Services and Supports Unit, Coordinated Care Organizations, Community Volunteer Network, Center for NonProfit Legal Services, and Ashland Senior Program.

An overview of how Title IIIB mandated and discretionary funding is being used and a high-level overview of results from recent senior needs assessments and stakeholder interviews was provided.

Based on gathered recommendations, **the following priorities are established for Title IIIB discretionary funding:**

- Continue to fund all of the activities that are currently funded.
- Develop or support services that address:
  - Social isolation and loneliness.
  - Transportation needs.

See Section B-3 Services and Administration for detailed service descriptions of all Title IIIB services and Section D-2 for a matrix of services provided to OAA and/or OPI consumers

## SECTION B - PLANNING AND SERVICE AREA PROFILE



## B - 1 Population Profile:

The most recent population estimates indicate that the RVCOG SDS Area Agency on Aging (AAA) which serves Josephine and Jackson Counties has a total population of approximately 308,040.<sup>1</sup> The vast majority of the population lives within the Rogue Valley statistical metropolitan area, which includes the cities of Medford, Ashland, Talent, Phoenix, Central Point, Eagle Point, and Jacksonville, and in the Middle Rogue statistical metropolitan area, which includes Grants Pass and the cities of Rogue River and Gold Hill.

Approximately five percent of area residents identify as a race other than white, with an additional 3.7 percent identifying as two or more races, resulting in an estimated 22,688 minority residents in the region.<sup>2</sup> Hispanic or Latino residents of any race make up 10.7 percent of the population of Jackson and Josephine Counties.<sup>3</sup> There are 3,047 Native Americans residing within the two-county area.<sup>4</sup>

In Josephine County, an estimated 4,310 people speak a language other than English at home (5.1 percent) while for Jackson County that estimate is 20,146 (9.5 percent).<sup>5</sup> Of those, approximately 2.7 percent speak English less than “very well.”<sup>6</sup>

It is estimated that 16.6% of people live below the poverty level and 11.7% live at or below 149 percent of the poverty level within the area.<sup>7</sup> Josephine County is more economically disadvantaged than Jackson County with 18.6 percent below the poverty level and 15.9 percent low income versus 16.7 percent poor and 9.3

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<sup>1</sup> Population Estimates for Oregon and Counties 2019, Population Research Center, College of Urban and Public Affairs, Portland State University, December 16, 2019

<sup>2</sup> US Census Bureau, 2013-2017 American Community Survey 5-Year Estimates, table S0102

<sup>3</sup> Ibid.

<sup>4</sup> Ibid., table DP05

<sup>5</sup> Ibid., table S0102

<sup>6</sup> Ibid., table S0102

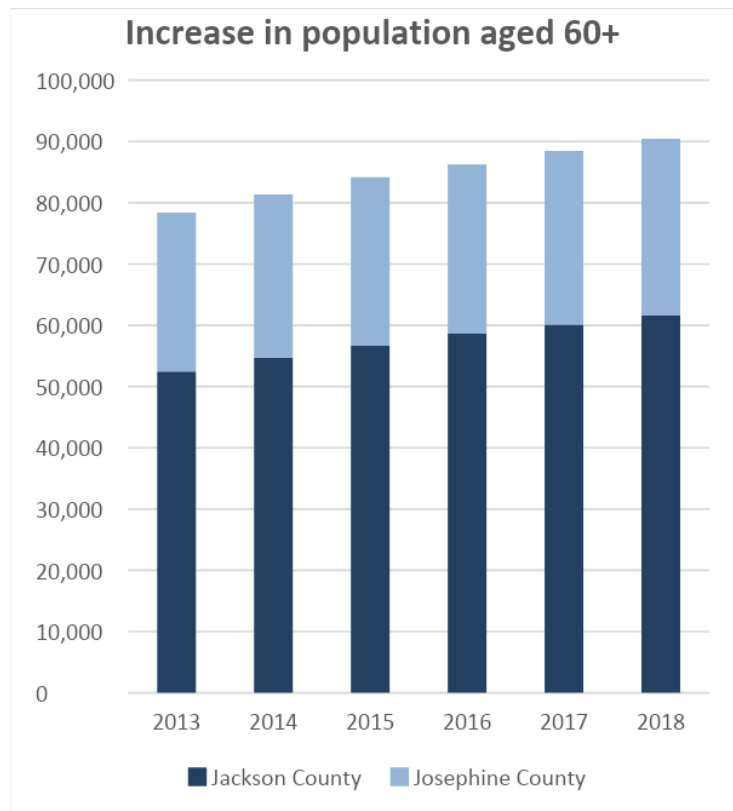
<sup>7</sup> Ibid., table S0102



percent low income in Jackson County.<sup>8</sup> Both counties have higher rates of poverty than the State of Oregon, which reports 14.9 percent below the poverty level. Estimates indicate that the State and Jackson County have similar percentage rates for low income (9.3% and 9.1% respectively).<sup>9</sup>

### People aged 60 and older

There are an estimated 93,975 people aged 60 years or older across the two counties<sup>10</sup>, for an estimated 30.6% of the population. Therefore, the two-county area features a higher proportion of older residents than the rest of the State, which reports 24.2 percent.<sup>11</sup> The proportion of older residents is climbing, with the percentage of persons 60 and older increasing in both Jackson and Josephine Counties from 2013 to 2017.<sup>12</sup>



<sup>8</sup> Ibid., table S0102

<sup>9</sup> Ibid., table S0102

<sup>10</sup> Ibid., table S0102

<sup>11</sup> Ibid., table S0102

<sup>12</sup> Ibid., table S0102

The senior population in the area is less racially and ethnically diverse than the general population. As the area population ages, it is expected that the senior population will become more diverse racially, ethnically and linguistically. Currently, slightly more than 3.7 % of area residents aged 60 and older identify as a race other than white with an additional 1.6% identifying as two or more races, resulting in 3,251 minority residents in the region who are 60 or older.<sup>13</sup> Hispanic or Latinx residents of any race make up 3% of the 60+ population of Jackson and Josephine Counties.<sup>14</sup> There are 495 Native Americans elders residing within the two-county area.<sup>15</sup>

In Josephine County, an estimated 1,048 people aged 60 or older speak a language other than English at home (3.7% of total 60+ population) while for Jackson County that estimate is 2,462 (4.5% of total population).<sup>16</sup> Among the residents in the two-county area who speak a language other than English, slightly above one percent speaks English less than “very well.”<sup>17</sup>

Economically, seniors are, on average, doing better than the general population. However, all ages are below the state averages. There are an estimated 9,075 people 60 and over who are below the poverty level (10.36 percent) and 11,029 people 60 and older who are at or below 149 percent of the poverty level (10.9 percent).<sup>18</sup> Statewide, 9.1 percent of people aged 60 and older are below the poverty level and 8.7 percent are low income.

### **People with disabilities**

In Jackson County, there are an estimated 35,426 adults with disabilities, and in Josephine County there are 16,355.<sup>19</sup> The resulting total of 51,781 adults with

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<sup>13</sup> Ibid., table S0102

<sup>14</sup> Ibid., table S0102

<sup>15</sup> Ibid., table DP05

<sup>16</sup> Ibid., table S0102

<sup>17</sup> Ibid., table S0102

<sup>18</sup> Ibid., table S0102

<sup>19</sup> Ibid., table S0102

disabilities in the area equates to 17.57 percent of the total noninstitutionalized population. The ratio of people with self-reported disabilities is higher in Jackson and Josephine Counties than the State of Oregon, in which 14.6 percent of the non-institutionalized population reports having a disability.<sup>20</sup>

In addition, the number of people with some self-reported difficulties, particularly ambulatory difficulties, are higher in Jackson and Josephine Counties than in the State of Oregon.<sup>21</sup>

<b>People with Self-Reported Difficulties<sup>22</sup></b>	Jackson County	Josephine County	Oregon
Persons with Self-Reported Hearing Difficulties	5.6%	6.5%	4.7%
Persons with Self-Reported Vision Difficulties	2.7%	2.9%	2.5%
Persons with Self-Reported Cognitive Difficulties	7.0%	7.5%	6.2%
Persons with Self-Reported Ambulatory Difficulties	8.9%	10.6%	7.5%
Persons with Self-Reported Self-Care Difficulties	3.1%	3.5%	2.8%
Persons with Self-Reported Independent Living Difficulties (ages 18+)	7.0%	7.4%	6.1%

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<sup>20</sup> Ibid., table S0102

<sup>21</sup> "DHS County Quick Facts," Oregon Department of Human Services, Feb. 2015

<sup>22</sup> Ibid.

## Summary Table

Characteristic	Jackson County		Josephine County	
	Total	60 years and over	Total	60 years and over
<b>Population</b>				
All	212,070	64,392	84,514	28,339
Rural (Source: 2010 Census Summary File 1)	40,748		37,191	
Male	48.8%	46.3%	48.9%	46.6%
Female	51.2%	53.7%	51.1%	53.4%
<b>Low income</b>				
Below poverty level	16.7%	9.3%	18.6%	12.6%
At or below 149%	10.8%	9.4%	15.9%	14.2%
<b>Race/Ethnicity/Language</b>				
Minority	8.6%	3.9%	7.8%	3.2%
Native American	0.9%	0.4%	1.4%	0.9%
Hispanic	12.2%	3.2%	7.1%	2.8%
Language other than English spoken at home	9.5%	4.7%	5.1%	3.7%
Limited English Proficiency	3.3%	2.0%	1.3%	0.6%
<b>Person with disability</b>				
	16.8%	33.4%	19.5%	32.2%
<i>Source: US Census Bureau, 2013-2017 American Community Survey 5-Year Estimates, table S0102</i>				

## B - 2 Target Populations:

Through a variety of programs delivered from numerous venues, RVCOC SDS addresses the needs of lower-income older individuals, older minority individuals, those with limited English speaking ability, and individuals residing in rural areas:

- 1. Rural, Low Income:** The agency operates 12 congregate/home-delivered meal sites and 5 home-delivered staging sites in the two-county area (Ashland, Cave Junction, Central Point, Eagle Point, Gold Hill, Grants Pass, Jacksonville, Medford, Merlin, Phoenix, Rogue River, Shady Cove, Talent, White City, Wilderville, Williams, and Wolf Creek) from which home-delivered and/or congregate meals are served. Nearly all of these meal sites serve areas that feature low household median income.<sup>23</sup>
- 2. Rural, Low Income:** We make a special effort to recruit Senior and Disability Services Advisory Council members from low-income, rural and limited English speaking communities.
- 3. Low Income:** Offices that can provide access to SNAP, medical insurance, assistance with medical supplies and Medicaid-funded long-term care support for eligible residents are located in Medford and Grants Pass. All offices provide staff visits to elderly individuals in response to referrals from self, family, agencies and other interested parties. They assess needs and provide assistance as required. The Aging and Disability Resource Connection (ADRC) is available toll-free to anyone regardless of income.
- 4. Low Income, Minorities, Limited English:** Latinx individuals are the predominant minority population in the two-county area. The Area

Agency and its contractors are all listed in locally-available resource guides including The Silver Pages, Senior Resources Directory, and Retirement

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<sup>23</sup> US Census, 2010

Connection. These publications are broadly distributed throughout the two-county area including medical offices, hospitals, home health and hospice agencies, home medical agencies, senior meal sites, and businesses where seniors congregate. The agency is also listed in local newspapers. Bi-lingual staff members, fluent in Spanish, are employed in all three field offices. One of the staff in the administration office is fluent in Spanish and is connected with a number of minority-based groups in the area including LInC (Latinx Interagency Committee), UNETE (farm worker group) and the Red Earth Descendants. The RVCOG SDS Executive Director, SDS Planner, and one of our Services Coordinators are fluent in Spanish and assist with interpretation and developing written materials in Spanish and advertisements in the local Hispanic Yellow Pages.

5. **Low Income, Minority, Limited English:** The agency actively participates on the Jackson County Homeless Task Force, including implementation of the Jackson County 10-Year Plan to End Homelessness, Josephine County Homeless Task Force, Jackson County Community Services Consortium, the Hispanic Interagency Committee, and the Multi-Disciplinary Adult Protective Services teams (MDTs) in Jackson and Josephine Counties.
6. **Limited English:** Bi-lingual staff members, fluent in Spanish, are employed in all of our offices. Spanish ADRC brochures are available in each of the Area Agency's Field Offices, contractor offices (including legal aid offices) and at all meal sites. They are also distributed throughout the two-county area to churches, medical offices, hospitals, home health and hospice agencies, and home medical agencies.
7. **Limited English, Minorities:** The agency actively recruits minorities and people with disabilities to work for our agency. There are 11 Spanish speakers and one Tagalog speaker in our three field offices being paid a differential for their language skills.
8. **Native American:** RVCOG SDS is participating in Regional AAA and Tribal meetings coordinated by Community Services and Supports, Oregon's State

Unit on Aging. These meetings are helping RVCOG SDS build relationships with the tribes who have members living in the Jackson and Josephine County Area. The focus is on increasing outreach to educate the tribal elders about services and resources. The agency conducted outreach for a needs assessment survey through the Klamath and Cow Creek Tribal Agencies, and received a number of surveys back from members of both tribes living in our service area.

- 9. Lesbian, Gay, Bisexual and Transgender (LGBT):** RVCOG SDS continues to reach out to the LGBTQ+ community to educate about services and resources. One of our SAC members and our local Community Services and Supports liaison have strong contacts with the local LGBTQ+ communities and have been assisting with outreach. The Southern Oregon Center for Community Partnerships, RVCOG SDS's non-profit, continues to spend down a small fund designated for the LGBTQ+ community. The Center was a sponsor for the 2019 Southern Oregon LGBTQ+ Health Wellness Summit and the agency sponsored a four-part 2020 LGBTQ+ Health Education Lecture Series for Healthcare Professionals.

## B - 3 AAA Services and Administration:

### **Directly Provided and Contracted Services**

RVCOG SDS provides some services directly and contracts with local agencies for others. Direct services are provided at a central administrative office, located in Central Point, and three Field Offices: two in Jackson County—the Senior Services Office and the Disability Services Office—and the combined Senior and Disability Services Office in Josephine County.

The following describes provided services and activities:

- A. **Administration, Program Coordination and Development** – Provide efficient and competent administration, program coordination, and development.

Under its Intergovernmental Agreement (IGA) with the State of Oregon, RVCOG SDS is responsible for:

- developing and annually updating a Four-Year Area Plan;
- implementing the planned services;
- maintaining required records;
- fulfilling the requirements of Federal regulations, State rules, and State Unit Policies and Procedures;
- supporting the Advisory Councils and their subcommittees;
- contract administration and monitoring; and





- financial accounting and quality assurance.

Under the IGA, the State also contracts with RVCOG SDS to partner with the Medicaid Long-Term Care and Financial Assistance programs which are directly provided by District 8 Aging and People with Disabilities (APD). RVCOG SDS and APD's goal is to provide a seamless service system to seniors and people with disabilities in the two-county area.

The AAA Director is employed by the Rogue Valley Council of Governments. RVCOG is a regional consortium of local governments that is the federally designated Area Agency on Aging (AAA) for Oregon District 8 Planning and Services Area (PSA) and encompasses the entirety of Josephine and Jackson Counties. RVCOG SDS is also a certified Aging and Disability and Resource Connection (ADRC) for the two-county area.

The AAA Director is responsible for all aspects of providing AAA services and activities provided by the RVCOG SDS including:

- Develops, recommends, and implements policies and procedures for a comprehensive service delivery system for seniors and persons with disabilities in the region;
- Provides oversight of SDS Budget, SDS Financial Expenditures and Reporting, Contracts and Grants Administration, Service Reporting and Area Plan, Program Coordination and Development;
- Takes lead role in the Senior Advisory Council and participates in Disability Services Advisory Council activities;
- Serves as the primary liaison for local, state, and national-level initiatives;

- Maintains contract relationship and partnership with Aging and People with Disabilities (APD); and
- Coordinates with RVCOG SDS's Food & Friends (F&F) Nutrition Program. It should be noted that though the AAA is responsible for providing the Older Americans Act meals program, RVCOG has chosen to make Food & Friends a stand-alone department of RVCOG SDS.

Senior and Disability Services (SDS) Management Team - The AAA Director is supported by the SDS Management Team:

- SDS Direct Services Program Supervisor - Provides direction, supervision, coordination, organization, and/or delivery of direct service programs, including, but not limited to Oregon Project Independence, Family Caregiver, Veterans Directed Care, Aging and Disability Resource Connection, Behavioral Health and Health Promotion programs, under the leadership of the Director of SDS and in collaboration with all grantors and funders. Plans, develops, and manages programs, resources and new initiatives in collaboration with various local community and regional partners, state and federal collaborators and all stakeholders. Recruits and monitors development of volunteer or internship opportunities related to direct service provision.
- Older Adult Behavioral Health Specialist – The Older Adult Behavioral Specialist engages community partners to strengthen services for older adults and people with disabilities. Collaboration includes community partners in the fields of geriatrics, disability, mental health, and addiction services. The Older Adult Behavioral Health Specialist plays a key role in increasing community awareness of RVCOG SDS programs and services and serves as SDS Training Liaison. The OABHS is responsible for coordination of the Four-Year Area Plan

and its annual updates and development and maintenance of SDS Website and SDS brochures/flyers. A new focus is on developing strategies for addressing social isolation for seniors and adults with physical disabilities.

- Program and Advocacy Specialist – The SDS Program and Advocacy Specialist provides oversight for the Home-at-Last, Disaster Registry, and Lifelong Housing programs. Assists the SDS Director with advocacy activities. Staffs the Senior Advisory Council and its Advocacy, Communications & Outreach, Executive and Support Services Committees. Develops agendas, follows up on assignments and activities, serves as lead in SAC member recruitment, screening, training and nurturing, and maintains communication and continuity between SAC, SAC Committees and SDS/F&F. Assists Direct Services Programs Supervisor with program fidelity, quality assurance, billing, and reporting for all OAA programs, OPI, OPI Pilot, and VDC. Provides Program Development, Systems Refinement and Special Programming services.

NOTE: The SDS Director receives administrative support services from RVCOG SDS and from an SDS Office Specialist, a RVCOG Accountant, and a RVCOG Grants and Contracts Administrator.

Program Coordination & Development - The RVCOG SDS Director and staff connect with other agencies and organizations serving the elderly; work to develop services; and mobilize non-OAA funds to enhance delivery of services to the elderly. These activities have a direct and positive impact on the enhancement of services. RVCOG SDS, through its Program Coordination and Development efforts, anticipates approximately \$394,000 of additional funding during Fiscal Year 2021 to enhance OAA and OPI services including, but not limited to, the following sources: Housing and Urban Development and City of Medford funds to support the Home-At-Last Program; State General Funds to support ADRC Information & Referral, ADRC Person-Centered Options Counseling, and Senior Mental Health

programs; Veterans Administration funding to support Veterans Directed Care Services; and local funding to support Older Adult Behavioral Health and PEARLS services.

### Other

- Southern Oregon Center for Community Partnerships  
The AAA Director participates in Southern Oregon Center for Community Partnerships Board (SOCCP) meetings to represent SDS programs and fundraising opportunities. SOCCP is a non-profit intended to raise public and private funds through fund raising, donations and endowments to benefit the existing and future clients of the Rogue Valley Council of Government's Senior and Disability Services (SDS) programs. As appropriate, the non-profit may also engage in activities that encourage communication, consultation, and cooperation across southern Oregon.
- Oregon Wellness Network  
SDS RVCOG SDS is a Partner with the Oregon Wellness Network (OWN), a division of the Oregon Association of Area Agencies on Aging & Disabilities (O4AD).

OWN is a network hub that provides administrative services to all of the AAAs in Oregon. These administrative services include a central referral system, data collection, training and quality assurance, and a billing and revenue management system.

Through this partnership, OWN establishes contractual relationships with different payers to include, but not limited to Medicare, Medicare Advantage companies, waived Medicaid organizations (called Coordinated Care Organizations (CCO) in Oregon), and private insurance companies with consumers in the Jackson, Josephine and Douglas County and across the state.

- Role of AAA in National Planning Efforts



- Medicare Access Improvement Act - The RVCOG SDS Joint Advocacy Committee has taken on a major role in educating Area Agencies on Aging and NAMI (National Alliance for Mental Illness) Chapters around the country about both federal Senate and House versions of the Medicare Access Improvement Act. Under Medicare, mental health services may only be paid for if they are provided by a licensed clinical social worker or a “higher level” provider. Marriage and family therapists and licensed counselors are not covered by Medicare. That leaves large—mostly rural—swaths of residents who receive Medicare benefits without mental health coverage. That impacts both seniors and adults with disabilities. When enacted, the Medicare Access Improvement Act will expand the provider network to include marriage and family therapists and licensed counselors.
- Accessible Housing - RVCOG SDS is leading a national effort to increase the availability of accessible homes everywhere. The movement is in its developmental stage. A steering committee with members from Oregon to Washington, DC, is hard at work deriving measurable goals, pondering funding options and building a functional website. This builds on RVCOG SDS’s Lifelong Housing Certification program. At the writing of this document, an RVCOG SDS staff member is working with a State Legislator and a committee to create legislation to encourage the creation of more units of accessible housing in Oregon.

B. Advocacy and Advisory Councils – Serve as a voice for the aging and people with disabilities in the Jackson and Josephine counties area. The AAA advocates to protect the independence, dignity, choice and safety of seniors and people with disabilities. The RVCOG SDS Director monitors,

evaluates, and comments on issues related to community actions affecting older persons; conducts or attends public hearings; represents older persons' interests at the local, state and national level; supports the Long-Term Care Ombudsman program, and coordinates planning with other agencies and organizations.

Two advisory councils assist with advocacy.

- Senior Advisory Council (SAC) – An up to 21-member Senior Advisory Council, appointed by the RVCOG SDS Board of Directors, is mandated under the federal Older Americans Act to advise the AAA Director. The Council provides advice and assistance with new program development and service implementation to meet the needs of seniors and people with disabilities, are advocates and sources of information to the community, and advise on key issues and emerging trends affecting seniors. Much of the SAC's work is accomplished through the following committees: Advocacy, Communications & Outreach, Council Development, Home and Community-Based Care, Support Services, ADRC Advisory, and Nutrition Advisory.
- Disability Services Advisory Council (DSAC) – An up-to-11 member Disability Services Advisory Council is mandated under Oregon Senate Bill 875. Although SB 875 requires that the majority of the members have a disability, and that some of the individuals be Aging & People with Disabilities (APD) services recipients, interested members of the community are welcome to participate. With members from both Jackson and Josephine counties, the DSAC meets monthly to advise local APD offices on program policy and the effectiveness of services provided (such as Medicaid and SNAP) to younger people (18-64) living with physical disabilities. Additionally and secondarily, the Council advocates and collaborates on matters not related to the Oregon Department of Human Services, and addresses local issues affecting people experiencing disabilities.

- Joint Disability and Senior Advisory Council Activities – DSAC Officers periodically meet with SAC Executive Committee members in order to assure synergy between RVCOG SDS and APD programs. When there are issues or topic areas of interest to both the DSAC and SAC, the full membership of the two advisory councils will meet.
- Advocacy Committee - Council or alternate members from both the SAC & DSAC may be appointed to serve on the Advocacy Committee. Staying informed of current and proposed pertinent legislation, the joint SAC and DSAC Advocacy Committee focuses on engaging, educating, and empowering SAC and DSAC members and the community in legislative advocacy.

C. **Behavioral Health** – Provide resources and services that help provide a better quality of life.

RVCOG SDS provides the following behavioral health-related services:



- Buried in Treasures – Training to learn the skills to de-clutter and stop acquiring so much “stuff”. This 16-week course helps improve the training participant’s life and create more living space for them and their family. This group is held once per week for two hours and offers a judgement-free environment for people ready to make a change in their life.
- Dementia Training – Teepa Snow: Positive Approach to Care - This training assists care partners (agencies, care providers, professionals) to better respond to the needs of individuals living with dementia.
- Older Adult Behavioral Health Initiative (OABHI) – The state is investing in senior behavioral health to better meet the needs of older adults and people with disabilities by improving access to care

and by making sure that providers work together to provide coordinated, high-quality physical and behavioral health care. The goal is to improve quality of life for older adults. This investment has placed professionals who specialize in behavioral health for older adults in local and regional community mental health programs. RVCOG SDS employs an Older Adult Behavioral Health Specialist (OABHS).

- PEARLS (Program to Encourage Active and Rewarding Lives for Seniors) - an evidence-based treatment program for older adults (and all-age adults with epilepsy) with minor depression. This brief intervention program is delivered in the home with 8 visits and 4 follow-up calls over a period of 6 to 8 months.
- OPAL (Options for People to Address Loneliness) - This program-in-development addresses issues of social isolation and loneliness through Options Counseling support and behavior modification strategies based on the PEARLS program. This brief intervention program is delivered in-home or remotely in 4 sessions with two follow-up phone calls.

D. **Community Living** – Enable consumers to understand the range of home and community-based residential care options.



- In-Home Care Assistance to persons who are having difficulty with one or more of the following activities of daily living—bathing; eating; toileting; ambulation; dressing; and cognition. Additionally, tasks such as preparing meals; shopping for personal items; using the telephone; doing light housework may be included. This type of assistance may be secured through two programs.



- Medicaid-funded In-Home Services - Caregivers help with bathing, eating, toileting, ambulation, dressing, cognition, housekeeping, meal preparation, medication management, and other personal needs to a Medicaid-eligible client living in their own home. An individual may directly employ a caregiver or they may opt to have the Medicaid office suggest/assign a caregiving agency. This program is only available to persons whose income/resources fall within eligibility criteria and who exhibit a sufficient need for assistance in managing their Activities of Daily Living (ADL). A Client Assessment and Planning System (CA/PS) and financial assessment is done for the individual to determine their eligibility.
- Oregon Project Independence (OPI) for seniors 60 and older and Oregon Project Independence for adults ages 19-59 with physical disabilities - Like the Medicaid in-home service, OPI provides in-home care to individuals who show a need for assistance in their ADLs and whose income/resources fall within eligibility criteria. OPI clients have a little too much income to qualify for Medicaid, but are at risk of institutional placement without help. Both financial and ADL assessments are done to determine both eligibility and priority level for each individual. Service coordinators provide support to each OPI client to ensure the care they receive is most appropriate for them and that any care transitions are supported. Like the

Medicaid program, a person can choose to either directly employ the caregiver themselves or have RYCOG SDS supply the caregiver through a contracted caregiving agency.

- Community Based Services - While in-home care provides the highest level of independence for a person needing care, there are several other options that also provide a higher level of independence than a Skilled Nursing Facility. Including:
  - Adult Foster Care (AFH) - This provides an option that closely approximates the home environment. Adult Foster Care homes can serve up to five individuals. APD staff license and monitor the care of clients who live in adult foster care homes.
  - Residential Care Facilities (RCF) - This option provides care for individuals in a residential setting. An RCF has six or more individuals in private or shared rooms. APD Medicaid staff determines eligibility for this service and monitors the care of clients who live in Residential Care Facilities.
  - Assisted Living Facilities (ALF) - Clients have their own apartments with many shared services such as meal preparation. APD Medicaid staff determines eligibility for this service and monitors the care of clients who live in the ALF
- Skilled Nursing Facilities (SNF) - For individuals in need of more intensive support on a 24-hour basis, APD Medicaid staff can provide access to people who meet financial and ADL eligibility criteria. The SNF is the least independent option, but is one that meets the needs of many individuals.



E. **Emergency Preparedness** – Connect vulnerable people to the Disaster Registry.

With the help of volunteers, RVCOG SDS maintains a Disaster Registry of frail elders and adults with physical, cognitive, or severe mental disabilities. Individuals may request an application in person or online via [www.RVCOGSDS.org](http://www.RVCOGSDS.org). The Disaster Registry was created after a 1997 flood in Jackson County, an event that highlighted the need for first responders to be able to locate vulnerable people before and during a disaster. It was activated most recently during the Almeda, Obenchain, and Slater fires that burned across the southern Oregon region during the summer of 2020.



F. **Family Caregiver Support and Training** – Provide access to a range of services to support family caregivers.

The Family Caregiver Support program is available to family caregivers who are caring for someone over the age of 60; who are caring for an individual and not receiving a wage or salary for providing that care; who are caring for an individual who is not receiving assistance through an acute care setting; who are 55 or older and caring for children age 18 and younger; or who are any age and caring for an individual with Alzheimer’s or other related disorders with neurological and organic brain dysfunctions.

- Family Caregiver Resource Specialists assist family caregivers by providing a place to start and information and assistance to caregiver resources in our area. They also help to develop a plan for care.
- RVCOG SDS provides the Powerful Tools for Caregivers training in the two-county area. Powerful Tools focuses on the family caregiver (not the disease process). It helps family caregivers take care of themselves while caring for an older adult, child with a disability, or person with Alzheimer’s or related dementia. A number of RVCOG

SDS staff team up with other agency trainers and volunteers to teach classes.

- Two dementia support programs designed to assist family caregivers navigate dementia are offered:
  - STAR-C is a program delivered in-home by trained clinicians and aims to decrease the symptoms of stress and/or depression that caregivers may experience; and
  - The Positive Approach to Care (PAC) program offers a specialized approach to dementia care and helps caregivers learn problem-solving techniques and increase their dementia knowledge.
- Family caregiver funding is available to pay for respite, a brief period of rest and relief for eligible family members, guardians, or others who are regular caregivers. Eligibility as described above.

G. **Federal Assistance Programs for Seniors and People with Disabilities** – RVCOG SDS partners with the locally-available Medicaid Long-Term Care and Financial Assistance Programs, Aging and People with Disabilities (APD).

The following are available to eligible consumers through APD offices:

- Contract Registered Nurse
- Medical Supplies
- Transportation, both medical and non-medical, is available for clients through partnership with a local transportation brokerage through a contract with Oregon's Medicaid program.

- Medicare Part D Low-Income Subsidy Screenings/Referrals and Choice Counseling – APD staff screen Medicare beneficiaries for Medicare Part D Low-Income Subsidy (LIS) and offer Medicare Part D choice counseling for people who are already eligible for both Medicare and Medicaid.
- Oregon Health Plan (OHP) / Oregon Supplemental Income Program (OSIP) – This means-tested program is for those 65 and older or those under 65 who have been determined disabled by Social Security Administration (SSA) criteria. Eligibility for OSIP qualifies the client for Medicaid. Medical benefits are provided through enrollment in a managed health care system or on a fee-for-service basis.
- Presumptive Medicaid Disability Determination Process—The State of Oregon is required to make Medicaid disability determinations within ninety (90) days for applicants alleging a disability that would meet the Social Security Administration (SSA) disability requirements for Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) and, for whom the SSA has not made a disability determination. The disability determination is one of the requirements an applicant must meet in order to establish eligibility for the Oregon Supplemental Income Program.
- State Plan Personal Care—Supportive services which enable a Medicaid financially-eligible person to move into or remain in their own home. Services are limited to 20 hours per month per client.
- Supplemental Nutrition Assistance Program (SNAP) – APD is the portal for older residents and persons with disabilities to access SNAP, formerly known as Food Stamps. The intent of the program is to improve the health and well-being of low-income individuals, older adults and people with disabilities, and other groups of people

by providing a means to substantially meet their nutritional needs. SNAP benefits are issued via an electronic Oregon Trail Card.



- H. **Health Promotion Programs** – Provide services that maintain or empower health including services for those with chronic conditions and diabetes.

SDS uses Older Americans Act Title IIID Prevention and Health Promotions funding as well as other funding to pay for a variety of health promotion activities. Title IIID may only be used for evidence-based activities.

- **Chronic Disease Self-Management Education** – RVCOG SDS has suspended offerings of evidence-based Chronic Disease Self-Management Education (CDSME) programs. The agency does continue to carry the license for CDSME programs and supports delivery of these programs in Spanish through our partnership with La Clinica in Jackson County.
- **Diabetes Education** - RVCOG SDS began offering the evidence-based Diabetes Prevention Program (DPP) in October, 2019. The one-year program, based on research from the National Institutes of Health and supported by the Centers for Disease Control and Prevention, can prevent Type 2 diabetes in people who are at risk, by making lifestyle changes focused on weight loss and being more active. RVCOG SDS is working with OWN to develop sustainable funding for this initiative. The agency hopes to begin offering another evidence-based diabetes education program, the Diabetes Empowerment Education Program (DEEP), in the near future.
- **Fall Prevention** - SDS has invested in several staff becoming certified to coach the “A Matter of Balance: Managing Concerns About Falls”



program. COVID-19 has put a stop to training for now. The agency fully anticipates it will complete the training once COVID is past. The evidence-based program is designed to help older adults reduce their fear of falling, thereby enhancing activity levels.



- I. **Information and Expert Help** – Provide knowledge or resources related to aging and disabilities.

Aging and Disabilities Resource Connection (ADRC) - The State of Oregon has developed a statewide ADRC program that provides seniors, people with disabilities, their loved ones and the community with free unbiased information about services and available community resources. The ADRC



provides a universal “No Wrong Door” model that emphasizes a person-centered approach designed to empower consumers to make decisions about their long-term care, plan for the future, spend their money wisely to delay or avoid using Medicaid funds, independently live at home longer, thrive with chronic conditions such as Alzheimer’s, and many more topics.

SDS RVCOG SDS is the certified ADRC of Jackson / Josephine Counties. Some ADRC staff members are certified by the National Alliance of Information and Referral (AIRS); others are in process of obtaining this certification. All have been trained in person-centered approaches to provide objective and trusted information about public services and community resources. ADRC staff aim to empower consumers to help make informed decisions about the consumer’s self-identified needs and goals.

Core Services Offered by the ADRC:

- **Information & Referral and Assistance** - The ADRC serves as the one-stop for consumers, their friends and family members, and the community as they seek to find information about resources for

those who are aging or have a disability. ADRC is designed to streamline access to information about available services, with referrals being made to programs and organizations that may meet the individual's specific needs. Assistance is provided in accessing services when needed or requested. ADRC's services are available on the phone and by email in both Jackson and Josephine Counties.

- Person-Centered Options Counseling - Trained professionals provide a more in-depth assessment of the consumer's situation and offer options for services and available community resources. Services are available over the phone, by email, or in person. Options Counselors aim to assist by putting the consumer's preferences and needs at the center of the planning process and by focusing on what is important to the consumer. Often times, Options Counselors enlist the support of the consumer's family, friends, and any other professionals chosen by the consumer to ensure that needs, preferences, and the consumer's choices are honored. With the consumer's consent, staff is also able to advocate on behalf of consumers who are not able to do so on their own due to lack of resources, cognitive ability, rural location, and so on.
- Online Resource - The ADRC of Oregon offers a database of resources for seniors and people with disabilities. Resources available include state programs, private companies, nonprofit organizations, and religious organizations that serve seniors and people with disabilities and meet the ADRC's inclusion/exclusion policy. RVCOG SDS has more than 340 listings in the database, which are updated annually to ensure that consumers are given the most accurate information possible. The website is available 24/7 to consumers at [www.ADRCoforegon.org](http://www.ADRCoforegon.org).

One of the main focuses of ADRC of Jackson / Josephine Counties has been to make services seamless for consumers between the Medicaid programs provided by Aging and People with Disabilities (APD) District 8 and the



programs provided through the AAA. RVCOG SDS and APD have formed a Team Enhancement Committee (TEC), which meets monthly to collaborate on enhancing the service delivery system between the AAA and APD. As its first major work product, the TEC developed a process for seamlessly sending referrals between the ADRC and all three APD offices. This process includes an on-going training for all current and new APD and AAA staff on services provided by both agencies.

**J. Lifelong Housing Certification**

RVCOG SDS has developed the first certification program in Oregon for Lifelong Housing. Before a home can be Lifelong Housing certified, a set of specific design and construction standards must be attained for the home. The certificate assures a prospective home buyer or renter that the house will make aging an easier process in their home for many years to come.

**K. Nutrition - Food & Friends Senior Meal Program and Meals on Wheels**



RVCOG, through the Food & Friends program, provides approximately 950 meals daily to seniors 60 and older and adults with disabilities in the two-county area. Meals are prepared in a central kitchen located in Jackson County, then transported to 12 combined congregate/home-delivered meal sites and 5 home-delivered meals-only sites where they are either packaged into home-delivered meals or served to meal participants who eat at the meal sites. Each meal complies with the Dietary Guidelines for Americans and provides a minimum of 33 percent of the current daily Recommended Dietary Reference Intake (DRI) established by the Food and Nutrition Board of the National Research Council of the National Academy of Sciences.

- Congregate Meals - Food & Friends provides approximately 200 meals daily at 12 congregate meal sites in the two counties to seniors

60 and older and adults with disabilities residing in the two-county area.

- Home-Delivered Meals  
Each day, approximately 300 volunteers deliver more than 800 home-delivered meals along 50+ routes to home-bound seniors in the two-county area. In addition, volunteer drivers perform regular safety checks on the clients to whom they deliver meals.
- Nutrition Education  
Food & Friends plans to distribute an article quarterly to all meal participants. Each publication includes nutrition and health education tips. Food & Friends meal site staff are educated regarding nutrition issues and supplied with approved educational materials to hand out and discuss with participants at meal sites as well as distribute and discuss with home-delivered meals participants. The articles will be on the website. In addition, Nutrition outreach staff will also provide information to people in their homes as part of the home-delivered meals eligibility process.

- L. **Safety and Rights** – Provide tools to protect aging individuals and individuals with disabilities from harm or abuse.

A variety of services are available:

- Guardianship/Conservatorship - The RVCOG SDS contracts with the Center for Nonprofit Legal Services to provide a guardianship/conservatorship program in Jackson County. The agency performs legal and financial transactions on behalf of a client based upon a legal transfer of responsibility (e.g., as part of protective services when appointed by court order), including establishing the guardianship/conservatorship.

- Legal Assistance - RVCOG SDS contracts for legal assistance services with:
  - Center for Nonprofit Legal Services (CNPLS) - The agency is staffed by Oregon licensed attorneys who are organized into four specialty units: Housing/Consumer, Family, Public Benefits/Employment, and Individual Rights. Low-income persons and seniors with priority legal problems are accepted by the agency for direct legal representation. The senior case load is about 10-15% of the total workload. Services are provided based on priorities established by the RVCOG SDS Senior Advisory Council.
  - Oregon Law Center (OLC) - A senior law hotline service is provided by Oregon licensed attorneys. The hot line is staffed 3 hours per week. Seniors are not screened for income eligibility but are screened for conflicts with prior OLC clients as per the Oregon State Bar Disciplinary Rules. Additional free legal assistance is provided as needed on a case-by-case basis. Free training is provided four times a year on relevant topics of interest to seniors. Services are provided based on priorities established by the RVCOG SDS Senior Advisory Council.
- Adult Protective Services/Elder Abuse/Patient Abuse – APD Medicaid staff provide Adult Protective Services (APS) to aged, blind or individuals with disabilities 18 years of age or older. The intent of the program is to investigate and document allegations of abuse and provide protection and intervention on behalf of those adults who are unable to protect themselves from harm or neglect. The Title XIX APD District Manager oversees this program.
- Elder Abuse Prevention –RVCOG SDS utilizes an Adult Protective Services (APS) Emergency Fund to pay for such things as emergency

shelter, transportation, food, medications, and clothing for seniors 60 and older in protective service situations

- Long-Term Care Ombudsman Program mileage support. The State of Oregon's Long-Term Care Ombudsman agency includes three programs: the Long-Term Care Ombudsman, the Oregon Public Guardian, and the Residential Facilities Ombudsman. The mission of the agency is to protect individual rights, promote independence, and ensure quality of life for Oregonians living in long-term care and residential facilities and for Oregonians with decisional limitations. Local, trained volunteers serve as the eyes, ears and advocates for Oregon's most frail and vulnerable citizens living in long-term care and residential facilities. Through a Memorandum of Understanding, SDS provides funding to help pay for LTC Ombudsman mileage.

## B-4 Non-AAA Services, Service Gaps and Partnerships to Ensure Availability of Services Not Provided by the AAA

There are many services in the Rogue Valley that seniors and people with disabilities frequently request that the AAA does not directly provide or contract to provide. Under each of the following services that are not provided by the agency, there is a list of key community providers that may help as well as indicating if no provider/service is available. This is not meant to be a complete list of resources.

A comprehensive list of resources in both counties can be found on the ADRC of Oregon website ([ADRCofOregon.org](http://ADRCofOregon.org)). Resources are updated annually to ensure accuracy for consumers. Resources are also listed in the Silver Pages, the Senior Resource Directory, and the Retirement Connection booklet.

In addition to listing key community providers for each service, the agency has included, as appropriate, information regarding planning, services necessity/gaps, and funding issues.

- Advocacy/Problem Solving/Dispute Resolution
  - Help Now! Advocacy Center
  - Center for Nonprofit Legal Services
  - Oregon Law Center - Grants Pass Office
  
- Alzheimer's or Other Dementia
  - Alzheimer's Association Oregon Chapter – Southern Oregon Regional Office
  - Power of the Heart Dementia Care Education and Behavior Coaching.
  
- Case Management (fee based or privately funded): Our belief is that a well-trained government and private case management/client consultant work force not only spreads the workload, it best meets the needs of seniors and people with disabilities in our area. To that end, RVCOG SDS shares information regarding training opportunities and, when possible, provides

training, for private geriatric care providers as it comes available.

- National Association of Private Geriatric Care Managers
- Senior Options, LLC - Jackson County.
- Power of the Heart Dementia Care Education and Behavior Coaching
- Georgie Gentry, Ground Spring Associates
- Aging and People with Disabilities District 8 (for Medicaid-eligible people only)
  
- Community Action Programs
  - UCAN Community Action Program of Josephine County
  - ACCESS Community Action Program of Josephine County
  
- Community Healthy Aging
  - Oregon State University Extension Service
  - Rebuilding Together, Rogue Valley - Fall Prevention/Home Modification Program
  - YMCA of Ashland, Medford and Grants Pass Senior Program
  - Jackson County Health and Human Services
  - Josephine County Health and Human Services
  
- Disability Services and Programs
  - HASL Center for Independent Living for Jackson and Josephine counties.
  - Jackson County Developmental Disability Services
  - Community Living Case Management of Josephine County
  - Southern Oregon Aspire
  - Creative Supports Brokerage
  
- Education and Counseling Programs
  - Consumer Credit Counseling Money Management Program (Jackson and Josephine Counties)
  - Medicaid Helpline 800-344-4354 (Jackson and Josephine Counties)
  - Community Volunteer Network - SHIBA Senior Health Insurance Benefits

- UCAN - SHIBA Senior Health Insurance Benefits (Josephine County)
- Southern Oregon University OLLIE Program for Seniors
- Age Wise Age Well peer mentoring program
- Compass House peer mentoring program
  
- Elder Abuse Awareness and Prevention
  - Aging and People with Disabilities District 8
  - Gate Keeper Program
  
- Emergency Response Systems
  - Asante Lifeline Emergency Response System
  - Connect America
  
- Employment Programs
  - Oregon Employment Department
  - Southern Oregon Goodwill Employment Program
  - Medford Employment Resource Center
  - Easter Seals of Oregon
  - Ashland Community Resource Center
  - The Job Council of Jackson and Josephine County
  
- Financial Assistance
  - ACCESS, the Community Action Agency of Jackson County
  - UCAN, the Community Action Program of Josephine County
  - St. Vincent de Paul
  - The Salvation Army
  - Anna May Foundation (through RVCOG SDS)
  
- Heating and Energy Assistance Programs
  - ACCESS, the Community Action Agency of Jackson County
  - UCAN, the Community Action Program of Josephine County
  
- Information and Referral/Assistance Programs (non-AAA funded)
  - 2-1-1 Info

- HASL Center for Independent Living
- Legal Assistance
  - Center for Nonprofit Legal Services
  - Oregon Law Center
  - Help Now! Advocacy Center
- Low Income and Emergency Housing
  - ACCESS Community Action Agency of Jackson County
  - Housing Authority of Jackson County
  - Josephine Housing Council
  - Medford Gospel Mission, Men's, Women and Children's Shelter
  - UCAN Community Action Program of Josephine County
  - St. Vincent de Paul
- Medical Equipment
  - ACCESS Community Action Agency of Jackson County
  - HASL Center for Independent Living – Jackson and Josephine County
  - UCAN Community Action Program of Josephine County
- Mental Health
  - Jackson County Mental Health
  - Options of Southern Oregon Josephine County Mental Health Service
  - Compass House Peer Mentoring Program
  - La Clinica Behavioral Health
  - National Alliance on Mental Illness of Southern Oregon
  - Rogue Community Health
- Minority Groups
  - Coquille Indian Tribe – Medford Office
  - Down Syndrome Association of Southern Oregon
  - Families for Community (support network for parents of children with special needs and disabilities)
  - LInC – Latinx Interagency Committee



- UNETE – Center for farmworker and immigrant advocacy
- LGBTQ Groups in the Rogue Valley
  - Southern Oregon Pride
  - Southern Oregon University – Queer Resource Center
  - TransOregon
- Money Management
  - Oregon Money Management Program - Consumer Credit Counseling of Southern Oregon
- Respite Care
  - ARC of Jackson County
  - Community Volunteer Network Respite Program
- Senior Centers
  - Ashland Senior Program (Focal Point)
  - Central Point Senior Center
  - Eagle Point Senior Center (Focal Point)
  - Grants Pass Community Center
  - Illinois Valley Senior Center
  - Medford Senior Center
  - Rogue River Community Center
  - Rogue River Community Center (Focal Point)
  - Upper Rogue Community Center

RVCOG SDS Food & Friends has agreements with several Senior Centers for use of their facility as a congregate meals site and in some cases for use of Senior Center staff as Meal Site Managers. These Centers are Focal Points (see Section C below).

- Volunteer Program
  - Community Volunteer Network Retired and Senior Volunteer Program (RSVP)
  - UCAN Senior Companion Program of Josephine and Douglas County

- Oregon Money Management Program – Consumer Credit Counseling of Southern Oregon
- Transportation: RVCOG SDS AAA will continue to work with Rogue Valley Transportation District and Josephine Community Transit to ensure the needs of seniors and those with disabilities are incorporated into their transportation plans / operations.
  - Josephine Community Transit
    - Dial-a-Ride Paratransit Program
    - Local Bus System
    - Rogue Valley Commuter Line (bus which connects Jackson and Josephine County)
  - Rogue Valley Transportation District
    - Valley Lift Paratransit Program
    - Local Bus System
    - Rogue Valley Connector (bus which connects rural areas of Jackson County to established local bus system)
  - United Way Call-a-Ride volunteer program
  - Veterans Administration



## SECTION C - FOCUS AREAS, GOALS, AND OBJECTIVES

***Our commitment is to outreach, to individualized person-centered services, and to agency partnerships.***

## C-1 Local Focus Areas, Older Americans Act and Statewide Issue Areas:

### **Person-Directed Services and Supports:**

RVCOG SDS supports providing respectful and responsive services and supports that take into account individual preferences, needs, values, cultures and diverse backgrounds. For example, when APD Case Managers, RVCOG SDS Service Coordinators and ADRC Options Counselors assist consumers, they strive to keep decision making as close to the individual as possible and support individual choices. RVCOG SDS staff provides each individual with accurate, objective information so that the individual can make informed decisions.

### **Service Equity:**

SDS will continue to maintain a commitment to service equity by:

- maintaining open dialogue and internal and external communication efforts that are centered on inclusion and outcomes – for example, RVCOG SDS will continue to participate in key community meetings including: Homeless Task Force, Human Service Consortium, United Way, UNETE, Latinix Interagency Networking Committee, and SOHealthy, Jackson Care Connect (CCO)/Aging and People with Disabilities Multi-Disciplinary Team, Mental Health Disability Advisory Committee, Public Safety Coordinating Council and the Suicide Coalition;
- creating a seamless long-term service and support delivery system that is culturally and linguistically responsive – for example, continue monthly Team Enhancement Committee (TEC) meetings with a focus on strengthening communication and cooperation between AAA and APD and assuring service delivery is inclusive;

- providing services at each consumer’s specific need level with community needs informing and guiding services – for example, continue to deliver person-centered ADRC services;
- providing long-term services and support information in a variety of formats to meet the diverse linguistic, literacy and community needs – for example, provide alternative format access such as Braille, personalized reading, large print materials, interpreting services and a commitment to addressing individual needs of clients;
- providing monitoring and evaluation of the quality and capacity of long-term services and supports – for example, assure that OPI Service Coordinators and ADRC staff deliver services in a consistent and effective way;
- ensuring staff, volunteers, and advisory group members represent and can appropriately communicate and address the cultural diversity of the area’s population – for example, continue to recruit SAC members from throughout the two-county area and through connections with individuals and organizations that have entre to culturally diverse groups such as the LInC, the Regional AAA/Tribal meetings, and LGBTQ+ community, as well as participation in the Jackson County Continuum of Care Board to oversee services to the homeless population; and
- allocating funds, developing and implementing contracts and policies that support underserved populations – for example, allocating funding to LGBTQ+ activities.

RVCOG SDS strives to take into account each individual’s preferences, needs, values, cultures, and diverse background, and works to assure that each individual is free from discrimination. All of our FCG Service Coordinators have completed Person-Centered Options Counseling and Oregon Project Independence Service Coordination training and are well versed in the person-centered approach.

RVCOG SDS provides equal employment opportunities to all qualified persons without regard to race, color, sex, sexual orientation, religion, age, national origin, physical and mental disability, veteran status, or any status or activity protected under applicable law. It is an RVCOG SDS policy that all employees perform their work with a concern for the well-being of their coworkers, clients, and the public. Under RVCOG SDS's Core Values, staff and volunteers are expected to adhere to and adopt the Core Value of Respect – “We will respect our clients, partners, members of the public, fellow employees, volunteers, and ourselves by treating everyone with dignity, understanding, and compassion.”

1. Information and Referral Services and Aging and Disability Resource Connection (ADRC)



*Provides knowledge or resources for seniors and people with disabilities.*

Most of the ADRC staff have completed Person-Centered Options Counseling training and understand the need to take into account each individual's preferences, needs, values, cultures and diverse background. ADRC services are delivered free from discrimination and disparity.

RVCOG SDS continues to fund ADRC activities with Older Americans Act, State General Fund and locally-matched Medicaid dollars. The agency participated in piloting use of State General fund dollars as match for Medicaid Administrative Claiming, but found it was not worth the time and effort required.

RVCOG SDS provides community outreach and education about the ADRC. The agency has developed a Referral Guide and a Resource Folder which are used as outreach and education materials. This includes ADRC

information. The agency regularly distributes these materials at local events where seniors and people with disabilities congregate and at public meetings.

The Referral Guide is available in the lobbies of all of the APD offices and the RVCOG SDS central office. The level of referrals to ADRC from the APD and APS staff remains consistent. The Referral Guide is available at the meal sites, and home-delivered meals eligibility staff provide it to new Food & Friends participants. The ADRC is posted in multiple places on the RVCOG SDS website (RVCOG SDS.org). All three local senior resource guides include thorough ADRC descriptions.

	Unduplicated Consumers	Number of Calls
7/1/-31/2013	19	29
7/1-31/2014	136	193
7/1-31/2015	200	274
7/1-31/2016	193	272
7/1-31/2017	185	270
7/1-31, 2018	173	255
7/1-31/2019	141	216
7/1-31/2020	155	197

To assist in informing the public about RVCOG SDS services, including ADRC, SAC Outreach & Communications (O&C) members and the AAA Director developed a PowerPoint Presentation, which trained SAC members and staff will use to give presentations. Once the COVID-19 danger passes, the



agency will be reaching out to faith communities, service clubs, utilities, etc. to schedule presentations. Staff will continue to work with O&C to develop and implement strategies to increase community awareness.

## Focus Area – Information & Assistance Services and ADRC

Goal: A system for older adults and people with disabilities that provides information and assistance to individuals seeking information on local resources, professionals seeking assistance for their clients, and individuals planning for their present and future long-term care needs.

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update
			Start Date	End Date	
Maintain fully-functioning ADRC for Jackson and Josephine counties.	a Staff ADRC I&R/A	Direct Services Programs Supervisor, ADRC Lead	1/1/21	12/31/24	8 either part- or full-time staff provide ADRC services, five days a week, Monday-Friday.
	b Staff ADRC Options Counseling	Direct Services Programs Supervisor, ADRC Lead	1/1/21	12/31/24	5 either part-or full-time staff provide ADRC services, five days a week, Monday-Friday.
	c Staff ADRC Database Maintenance	Direct Services Programs Supervisor, ADRC Lead	1/1/21	12/31/24	<ul style="list-style-type: none"> <li>Database maintained monthly.</li> <li>RVCOG SDS hired a part-time Office Specialist who helped get the Resource Database caught up and now assists with ongoing maintenance.</li> </ul>
	d Participate in statewide ADRC meetings	ADRC Lead	1/1/21	12/31/24	Participate monthly.
	e Staff ADRC Core Partners	Direct Services Programs	1/1/21 Least	12/31/24	<ul style="list-style-type: none"> <li>Meet quarterly.</li> <li>Combined</li> </ul>

		meetings	Supervisor, ADRC Lead	Quarterly		Core Partners meeting with SAC Support Services Committee meeting. <ul style="list-style-type: none"> <li>• Meet February, April, August, November.</li> </ul>
	f	Staff ADRC Advisory Committee meetings	Direct Services Programs Supervisor, ADRC Lead	1/1/21 - Quarterly	12/31/24	<ul style="list-style-type: none"> <li>• Combined ADRC Operations Committee meeting with SAC Support Services Committee meeting.</li> <li>• Meet February, April, August, November.</li> </ul>
	g	Develop training plan for all ADRC specialists which includes person-centered and service equity training.	Direct Services Programs Supervisor, ADRC Lead	1/1/21	12/31/24	<ul style="list-style-type: none"> <li>• Except for one part time ADRC staff, all other ADRC staff has completed Person Centered Options Counseling training.</li> <li>• ADRC staff participates in state Webinars.</li> <li>• Two ADRC staff are bilingual.</li> </ul>

Goal 2: Increase monitoring and quality control for ADRC service delivery to improve and expand services.

Measureable Objectives	Key Tasks		Lead Position & Entity
Evaluate, assess and modify, as necessary, current ADRC service delivery system	a	Maintain accurate and concise record keeping of consumers who contact the ADRC, including demographic information to ensure services and outreach are being provided to the under-served population in Jackson and Josephine County.	Direct Services Programs Supervisor, ADRC Lead
	b	Annually shadow each ADRC staff person to ensure AIRS service delivery standards are being met	Direct Services Programs Supervisor, ADRC Lead
	C	Utilize representatives from Advisory Councils, TEC, ADRC Advisory Committee and Staff to review results from tasks 'a' and 'b' as well as to offer input on service provision.	SDS Director, Direct Services Programs Supervisor, ADRC Lead
	d	Implement any changes necessary to better serve and reach more consumers	SDS Director, SDS Direct Services Programs Supervisor, ADRC Lead

## 2. Nutrition Services (OAA Title IIIC) - Food & Friends



*Food & Friends meal site at the Talent Community Center*

Food & Friends' target population is adults 60 years or older and eligible younger adults with disabilities who are at a high risk of experiencing hunger. Food & Friends strives to take into account each individual's preferences, needs, values, culture and diverse background and works to assure that each individual is free from discrimination and disparity. Based on US Census population data from Section B-1 of the Population Profile, 30% of those living in Jackson County and 33.5% of those in Josephine County are age 60 or older. This is notably higher than the state (24.2%) and national (16.2%) figures. In Jackson County 16.7% and in Josephine County 18.6% of the population lives in poverty, higher than the state level of 14.9%.

Approximately 3,000 people elect to participate in our program on an annual basis and Food & Friends surveys consistently demonstrate that, for many of the clients the agency serves, the meal delivered is the only one they will eat that day

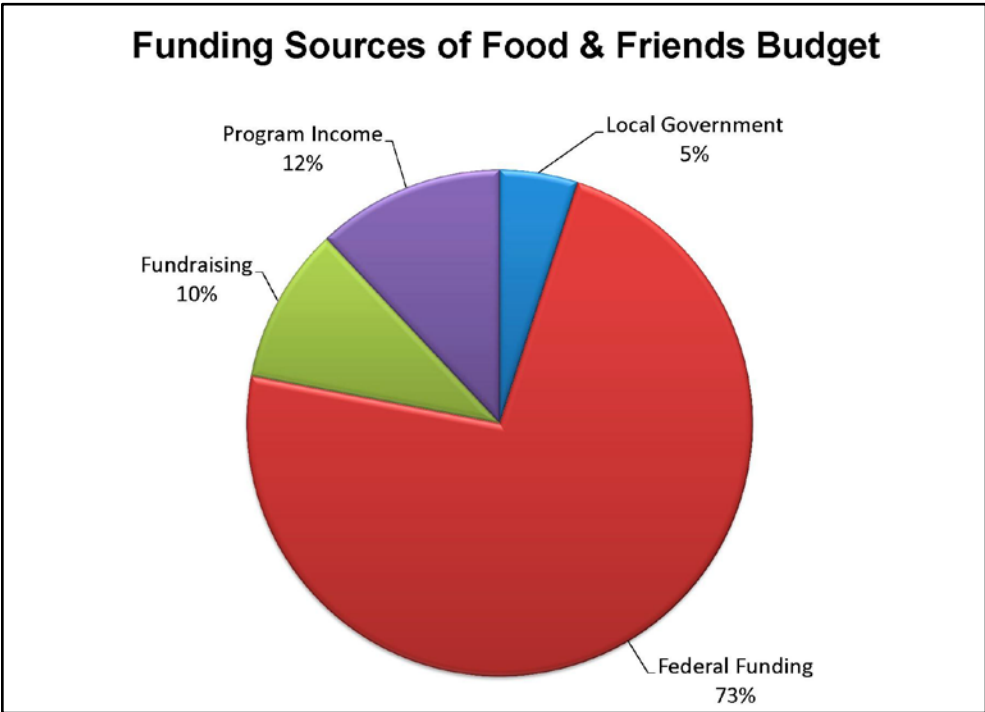
(44%), and the volunteer who delivers the meal is often the only person they will see on a given day (51.9%). The regular visit to our home delivery clients provides a safety check, something that is not provided by any other service providers in our region.

The Food & Friends survey also consistently demonstrates that our clients feel that they are benefiting from the service the agency provides. In our 2019 annual survey, 87.2% of respondents reported improved nutritional health, 89.1% report feeling safer and 89.5% indicated that the volunteer visit makes them feel less isolated. Our Congregate diners reported similar outcomes in the same survey, 63.9% responded that their nutritional health had improved, 69% reported that eating at the meal site has improved their quality of life, and 97.8% agreed they enjoy the meals at the meal site. 98.6% said they are satisfied to very satisfied with the Senior Meal Site Program.

**How Title III C Funding will be used:**

Title III C federal funding will be used to provide service to home delivery and congregate meal clients in both Jackson and Josephine Counties, which will include the cost of meal preparation, packaging, transportation, staffing, and volunteers (includes mileage reimbursement, volunteer supplemental insurance and volunteer training costs). All contractors for meal preparation will be required to hold increases in costs to a maximum of 4% annually.

Due to typically flat OAA funding, which is actually a reduction in real dollars, Food & Friends depends on a variety of strategies to address this challenge, including fundraising (**see Funding Chart on next page**).



Because RVCOG does not own any of the sites it uses for staging home-delivered meals or for congregate meals (other than the Josephine County Senior Resource Center, which RVCOG purchased and renovated in FY 19/20), the no or low-cost partnerships with organizations or cities for space have been critical to allowing Food & Friends to continue to meet demand without resorting to a wait list. Partnerships with the following communities provide funding or free/low-cost space: City of Ashland, Ashland Senior Center, Central Point, Central Point Grange Hall, Eagle Point Senior Citizens Club, Eagle Point, Gold Hill IOOF, Jacksonville IOOF, Jacksonville, Medford, Medford Lions Sight & Hearing, Medford Senior Center, Merlin Community Center, Phoenix, Rogue River Community Center, Rogue River, Shady Cove, St Martin's Episcopal Church, Talent Community Center, White City, Wilderville Methodist Church, and Wolf Creek Civic Association.

**Meal Sites/Distribution Points (Congregate meals are served 11:30 a.m. – 12:30 p.m.):**

Food & Friends - Jackson County		
Site	Location	Days
Ashland	1699 Homes Ave, 97520	M-F
Central Point	436 E. Pine St, 97502	M-F
Eagle Point	121 Loto St, 97524	M-F
Gold Hill	483 4th Ave, 97525	M, Thu
Jacksonville	175 S. Oregon St, 97530	M-F
Medford	228 N. Holly St, 97501 510 E. Main St, 97504	M-F Tu-F
Rogue River	132 Broadway, 97537	M-F
Shady Cove	95 Cleveland St, 97539	Tu, Thu
Talent	104 E. Main St, 97540	Tu-Thu
Talent/Phoenix	121 W. 2nd St, Phoenix, 97535	M-F
White City	3131 Ave "C", 97503	M-F

Food & Friends - Josephine County		
Site	Location	Days
Cave Junction	520 E River St, 97523	M-W-F
Grants Pass	1150 NE 9th St, 97526	M-F
Merlin	109 Acorn St, 97532	Tu, Thu
Wilderville	7970 Redwood Hwy, 97543	Wed
Williams	(Service from Grants Pass)	Wed
Wolf Creek	100 Railway Ave, 97497	Tu, Thu

Service is provided five days a week in most areas, although several factors including distance, expense, and availability of volunteers affect days of service, especially in remote areas. Recipients of home delivered meals in areas with service of fewer than five days a week are offered frozen meals to cover the days Food & Friends is not able to deliver.

**Changes in Meal Production and Delivery Systems (if necessary):**

***Normal Operations (which will resume after COVID-19):***

At this time Food & Friends has no plans to make significant changes to its normal production and delivery, beyond those required by the COVID-19 pandemic. The program is considering a more environmentally friendly packaging that is completely biodegradable. Regarding funding, several factors (including economic conditions and changes to tax laws related to charitable donations, as well as any unforeseen implications resulting from the COVID-19 pandemic) may make it difficult to continue to close the state and federal funding gap entirely through our fundraising efforts. The program does have a plan to help address increases in demand coupled



with possible lower revenues, which would involve some or all of the following:

- Non-essential food items such as dessert may be eliminated.
- Delivery frequency may be reduced with the option of providing one hot meal with a frozen for the next day.
- Lower risk clients (as determined by our initial eligibility screening, NAPIS evaluation, and the Meals Service database) would be the first to be placed on the waiting list, giving the priority for service to high-risk clients.

***Temporary Changes Made During the 2020 COVID-19 Pandemic:***

The pandemic had some major impacts on how the agency carries out services in 2020 while keeping staff and clients safe. The following summarizes what was done in order to continue providing service:

- Discontinued serving lunch on-site to diners and began providing “to go” meals for those clients, allowing individuals to continue receiving the meals they needed while also minimizing contact with others. Volunteers delivering Meals on Wheels were instructed to carry out “no contact deliveries.”
- Extra protocols around handwashing, cleaning and disinfecting of work areas, and physical distancing practices were implemented in all locations. Posters and other printed materials were distributed, reminding all present to practice safe behaviors.
- When funding allowed and the agency was able to source the items, hand sanitizer and various types of face coverings and gloves were provided to the sites for staff and volunteers, although it was found that many volunteers were able to provide their own.

- Our contractor for meal preparation ensured CDC recommendations were followed by staff at the kitchen and by their delivery drivers.
- Food & Friends used COVID-related funds to purchase additional grocery and durable goods for distribution to clients.

The aforementioned are temporary arrangements due to COVID-19 in 2020. These arrangements may continue into 2021, depending on the trajectory of the epidemic. As things return back to normal operations, Food & Friends plans to return to its original service model.

**Partnerships:**

Food & Friends has developed a large base of partner agencies who share our objective of providing critical services and assistance to our clients. They include: OSU Extension registered dietitian (nutrition info), ACCESS Inc. (e.g. additional outreach, additional food items, energy assistance), Jackson Co Health & Human Services (information or health services for clients), Retired & Senior Volunteer Program (volunteer recruitment), Oregon Dept. of Human Services (criminal background checks for volunteer drivers), regional hospital discharge planners, Medicaid case managers (referrals) and AllCare Coordinated Care Organization.

In emergencies, Food & Friends makes reports to family or case managers, and if necessary, to emergency services and in many instances Adult Protective Services. Additionally, new partnerships have been established to help carry out our service during the current pandemic, as described above. As has been long-standing practice, the agency will continue to explore any partnership that provides additional benefits to our clients. During the last 20 years, the agency has established an effective fundraising strategy that includes two mailer campaigns a year, one to established donors and the other as an acquisition mailer. The agency has set in place a recognition protocol for our donors that has been successful in generating larger donations from them in subsequent years. An endowment has been established to benefit the nutrition program and the agency has a very successful track record in writing successful grant applications -

based on the local community and many charitable foundations' faith in our ability to carry out our mission.

### **Nutrition Education:**

- Quarterly nutrition education instruction is conducted using approved nutrition education training materials. Following these education sessions, the congregate sites will return a list of clients in attendance with a copy of the education topic covered for tracking and reporting purposes.
- All new starts and reassessment clients will receive nutrition education via our Outreach Coordinators. The Outreach Coordinators record a Nutrition Education unit of service in Oregon Access each time an education topic is covered.
- Staff are required to present education to congregate meal clients no less than on a quarterly basis. Site Coordinators are trained on how to present these materials through practice sessions at regular coordinators' meetings.
- Per the ODHS Congregate and Home-Delivered Nutrition Program Standards – Older Americans Act and OPI, Nutrition Education, Item 15 - “Nutrition Counseling may be provided to participants where appropriate.” Food & Friends has chosen not to provide nutrition counseling due to funding constraints and the severe lack of qualified dietitians and nutritionists in our region.
- The Food & Friends website has links on the “Resources” page for those clients and family members interested in more education topics. Links to topics in Spanish are also provided.
- Food & Friends has a partnership with OSU Extension to distribute their nutrition and health publication to supplement our nutrition education efforts.

### **Link between the Nutrition Program and Other Applicable AAA Services.**

Some of the ways in which the Food & Friends program ensures that it is employing best practices in benefitting the senior and disability clients in the

region, and is interacting closely with other AAA services in doing so, are as follows:

- The Food & Friends staff regularly makes referrals to the ADRC to assist callers in finding solutions for their issues.
- Based on funding availability, Food & Friends will continue to provide meals to OPI Pilot younger adults with disabilities as a component of their service plan. OPI clients have long benefitted from the nutrition program regardless of availability of OPI funding to cover the cost.
- Food & Friends regularly distributes information to its clients on the availability of Powerful Tools for Caregivers and other health promotion programs.
- Food & Friends provides, through the congregate sites and home delivered meal delivery, the means by which various SDS programs can reach some of the region's neediest and frailest seniors.
- Consumer Financial Protection Bureau handouts are periodically distributed to clients as an additional source of information.

## Focus Area - Nutrition Services

Goal: Reduce Older adult hunger and food insecurity

Measureable Objectives	Key Tasks		Lead Position & Entity	Timeframe for 2021-2024		Accomplishment or Update
				(by Month & Year)		
				Start Date	End Date	
Increase meal output to at risk seniors	a	Continue to offer over yield as an additional meal for those seniors attending congregate meal sites especially in rural areas.	Meal Site Coordinators	1/1/21	12/31/24	
	b	Establish partnerships with local food retailers to augment clients' diets with donated fruit, vegetables, bread or protein foods.	Nutrition Program Administrative Manager	1/1/21	12/31/24	

Goal: Increase volunteer recruitment

Measureable Objectives	Key Tasks		Lead Position & Entity	Timeframe for 2021-2024		Accomplishment or Update
				(by Month & Year)		
				Start Date	End Date	
Maintain adequate volunteer force to meet demand for service	a	Utilize Facebook to increase awareness	Nutrition Program Operations Manager	1/1/21	12/31/24	
	b	Continue to use MOWA social media and recruitment materials/tools.	Nutrition Program Operations Manager	1/1/21	12/31/24	

	c	Continue to use various tools to outreach for volunteer recruitment and education.	Nutrition Program Operations Manager	1/1/21	12/31/24	
	d	Senior Advisory Council will continue meeting.	Communications & Outreach and Outcomes & Evaluations Committees	1/1/21	12/31/24	

Goal: Identify and develop new partnerships

Measureable Objectives  Establish MOU's	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update
			Start Date	End Date	
a	MOU agreement with Providence Hospital in Jackson Co as a back-up for meal production in the event of the main kitchen not functioning	Nutrition Program Administrative Manager	1/1/21	12/31/24	
b	MOU agreement with Three Rivers Asante medical center, Josephine Co. as a back-up for meal production in the event of the main kitchen not functioning	Nutrition Program Administrative Manager	1/1/21	12/31/24	
c	MOU with OSU Extension Food Hero's publication permission to publish on our webpage	Nutrition Program Administrative Manager	1/1/21	12/31/24	

Goal: Increase access to additional nutrition education

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
Provide opportunities for access to additional nutrition education	a	Partnership with OSU Extension to provide nutrition education that is applicable to seniors.	Nutrition Program Administrative Manager	1/1/21	12/31/24	
	b	Distribute OSU "Food Hero" newsletter.  Distribute senior-appropriate nutrition education publications.	Outreach Coordinators & Meal Site Coordinators	1/1/21	12/31/24	
	c	Explore adding opportunities for online or internet-based Nutrition Education.	Contractor, Outreach Coordinators & Meal Site Coordinators	1/1/21	12/31/24	
Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
Assure Nutrition Program staff & volunteers are trained.			Start Date	End Date		
	a	Regular bi-monthly meetings for Nutrition Program staff	Nutrition Program Managers & Administrative staff	1/1/21	12/31/24	
	b	Volunteer	Nutrition Program Operations	1/1/21	12/31/24	

		orientations	Manager		(ongoing)	
	c	MOWA webinars to provide training for administrative staff	Administrative staff	1/1/21	12/31/24 (ongoing)	



### 3. Health Promotion (OAA Title IIID)

*Health Promotion Programs – Provide services that maintain or empower health including services for those with chronic conditions and diabetes.*



SDS uses Title IIID and other funds to pay for a variety of evidence-based activities.

Up through spring 2019, SDS delivered Chronic Disease Self-Management Education Programs, but loss of State General Funds forced us to suspend delivery. RVCOG SDS is now licensed under the Oregon Wellness Network to deliver these programs, and under the umbrella of this license, La Clinica in Jackson County delivers Spanish CDSME. Additionally, SDS supports La Clinica

by providing materials, training support, and reporting to the Oregon Wellness Network.

In October 2019, the agency began offering the National Diabetes Prevention Program (NDPP), knowing that other funding sources could be developed through Medicare and private insurers to pay for the program. The class continued virtually due to COVID-19, and a new virtual NDPP class is planned to start in early 2021.

The agency has been supporting Buried in Treasures, an evidence-based program to address the issue of hoarding behavior, primarily with income generated through the Veteran Directed Care program, but also with some IIID Prevention and Health Promotion funding.

Finally, RVCOG SDS has a robust PEARLS (Program to Encourage Active and Rewarding Lives for Seniors) program to address mild to moderate depression in seniors. This program was funded until July 2020 with state Mental Health funding, and the agency hopes to continue this program with some support from IIID Prevention and Health Promotion funding and income from the Veteran's Directed Care program, as other sources of funding are explored to support this successful program.

All of these programs are grounded in a person-centered approach that supports each individual's preferences and choices related to the program goal.

The long-term success of our communities will be greatly determined by the health of our residents. Efforts to achieve a sustainable health care and long-term support system will have to place much more emphasis on health promotion. To that end, the RVCOG SDS AAA will strive to develop contracts with local CCOs, as well as a system for billing CMS, in order to support our current programs.

**Problems/Needs:**

Health promotion programs address the social determinants of health, an understanding which is gaining broader support from the Centers for Medicare and Medicaid (CMS) and Coordinated Care Organizations (CCOs). Only recently have providers embraced the clearly demonstrated outcomes of self-management and other health promotion programs. The agency is working closely with the Oregon Wellness Network on an initiative to begin billing CMS and contract with CCOs to support NDPP and PEARLS, as well as a new evidence-informed program that is being developed with a COVID ADRC/ACL grant, “OPAL” (Options for People to Address Loneliness; See Behavioral Health Section ).

**Goal: Improve health outcomes by offering person-centered Health Promotions programming to meet the needs of the most vulnerable populations in our service area.**

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024		Accomplishment or Update
			(by Month & Year)		
			Start Date	End Date	
Continue to offer NDPP class.	a. Recruit participants for and have newly trained staff offer an all-online NDPP class during the pandemic, and then regular annual classes in-person.	Direct Services Programs Supervisor	1/1/2021	12/31/2024	
	b. Work with local CCOs, hospitals, and other agencies to establish referral procedure.	SDS Director, Direct Services Supervisor	1/1/2021	12/31/2024	
	c. Work with Oregon Wellness Network to establish CMS billing procedures.	Direct Services Supervisor	1/1/2021	12/31/2021	

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024		Accomplishment or Update
			(by Month & Year)		
			Start Date	End Date	
Continue to partner with La Clinica to offer Spanish Chronic Disease Self-Management classes	a. Ensure La Clinica staff and volunteer leaders maintain active leader status with program	Direct Services Programs Supervisor	1/1/2021	12/31/2024	

	b.	Continue to provide training, supportive materials, and reporting for all CDSME classes delivered	SDS Director, Direct Services Supervisor	1/1/2021	12/31/2024	

Measureable Objectives  Continue to offer PEARLS and Buried in Treasures	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update
			Start Date	End Date	
a.	Maintain a small ongoing PEARLS program	Direct Services Programs Supervisor, Behavioral Health staff	1/1/2021	12/31/2024	
b.	Offer Buried in Treasures class as soon as in-person classes become possible	Direct Services Supervisor, Behavioral Health staff	1/1/2021	12/31/2024	
c.	Work with Oregon Wellness Network to establish any possible CMS billing procedures.	Direct Services Supervisor	1/1/2021	12/31/2021	

#### 4. Family Caregivers (OAA Title III E)

*Family Caregiver Support and Training – Provide access to a range of services to support family caregivers.*



In December 2018, RVCOG SDS convened a Strategic Planning for Caregiver Initiative meeting to review current family caregiver services, identify gaps, and develop and prioritize strategies for meeting gaps. Meeting participants included service providers, Senior Advisory Council members, Southern Oregon Center for Community Partnerships Board members, community members, and AAA staff. The majority of the participants were, or have been, family caregivers. As a result the following list of priorities was developed:

- 1) Education/training (caregiver support)
- 2) General population awareness
- 3) Provide a caregiver college
- 4) Provide more respite/day care (caregiver support)
- 5) Provide workplace education
- 6) Do advocacy to increase funding/capacity
- 7) Provide home modifications (caregiver support)
- 8) Provide support groups (caregiver support)

The AAA is utilizing the priorities to inform local program development and service delivery.

Current Family Caregiver services include: Access to Caregiver Support, ADRC I&R and Options Counseling for family caregivers, Powerful Tools for Caregivers, one-on-one STAR-C, Teepa Snow Positive Approach to Care, and respite.

**Limited English-speaking and ethnic caregivers, including Native American caregivers:** RVCOG SDS employs staff members who are fluent in Spanish, and the Powerful Tools program has been translated into Spanish and has served as a valuable addition to services offered. Unfortunately, although RVCOG SDS employs one Service Coordinator trained to lead Powerful Tools who is fluent in Spanish, it has not yet been successful in recruiting Spanish-speaking Powerful

Tools leaders. If in the future the agency can find one more individual to train, the Spanish version of Powerful Tools for Caregiving can then be offered.

**Caregivers in the Greatest Economic and Social Need:** Though RVCOG SDS does not screen based on income, consumers are asked if they are able to hire an outside caregiver. In general, most report they don't have the resources to make such a hire, and therefore have to depend on relatives to provide the service. Unfortunately, a significant number of family caregivers receiving support also have physical and mental disabilities.

**Caregivers Providing Care to Persons with Alzheimer's/other Dementias:** RVCOG SDS offers two dementia support programs designed to assist family caregivers navigate dementia: 1) STAR-C is a program delivered in-home by trained clinicians and aims to decrease the symptoms of stress and/or depression that caregivers may experience; and 2) The Positive Approach to Care (PAC) program offers a specialized approach to dementia care and helps caregivers learn problem-solving techniques and increase their dementia knowledge.

In addition, many of the participants in our Powerful Tools classes are caregivers of people with Alzheimer's/dementia. Powerful Tools leaders provide resource tables at each of the workshop sessions and refer participants to STAR-C, PAC, and other SDS services or out to other community resources such as the Alzheimer's Association, local respite and adult daycare providers, and support groups.

**Caregivers Providing Care to Persons at Risk for Institutionalization:** Often family caregivers are what stand between a consumer staying in the home and placement in an institutional care setting. The one-on-one support family caregivers receive either through ADRC Options Counseling (short term) or from AAA Service Coordinators (ongoing Access to Caregiver Support) can make all the difference in preventing or delaying a loved one's placement in a facility. Having the ability to talk with an Options Counselor or Service Coordinator who has the training, experience, and knowledge helps the family caregiver know how to care



for oneself, manage their loved one's care needs and behaviors, and to be able to problem solve and plan for the future.

**Non-traditional Family Caregivers (Lesbian, Gay, Bisexual and Transgender):**

RVCOG SDS continues to reach out to the LGBTQ+ community to provide information about services and resources. One of our SAC members and our local Community Services and Supports liaison have strong contacts with the local LGBTQ+ communities and have been assisting with outreach.

**Grandparents/Relatives Raising Children:** There is a support group in Grants Pass called "Grandparents as Parents," which has been meeting weekly for over 15 years. A partnership with Boys and Girls Club allows for the space and free child care during these group meetings. Although this group is located in Grants Pass, grandparents from Jackson County have been invited to attend. RVCOG SDS provides resource materials to the support group. Though RVCOG SDS is not directly involved in running this support group, it provides resource materials, refers grandparents to the group, and recruits support group members to participate in the Powerful Tools for Caregiving workshops and encourages members to take advantage of other RVCOG SDS services. Although the group has not been meeting since the COVID-19 pandemic began, members are using phone calls to continue to provide support.

**Older individuals caring for people with disabilities, including developmental disabilities:** RVCOG SDS partners with HASL, the Center for Independent Living.

**Focus Area – Family Caregivers**

**Goal: Increase support options for Family Caregivers**

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
Develop and deliver remote (Zoom) Powerful Tools class	a	Ensure key staff have technology access and support for delivering online classes.	SDS Direct Services Supervisor	7/1/20	6/30/21	
	b	Develop and train staff and volunteers in online program delivery	SDS Direct Services Supervisor, Family Caregiver Lead	7/1/20	12/30/24	
	c	Deliver remote Powerful Tools classes as needed	Family Caregiver Lead	10/1/20	12/30/24	

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
Develop and deliver remote or in-person Spanish Powerful Tools class	a	Identify volunteer leaders and provide Powerful Tools Leader Training	SDS Direct Services Supervisor, Family Caregiver Lead	7/1/21	6/30/22	
	b	Work with community partners, including La Clinica, to find and support Spanish-speaking caregivers	SDS Direct Services Supervisor, Family Caregiver Lead	1/1/22	12/30/24	
	c	Deliver Spanish Powerful Tools class	Family Caregiver Lead	6/30/22	12/30/24	

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
Initiate and support creation of a more general Family Caregiver Support Group (i.e., not focused on a particular need group)	a	Locate partner agency to host support group	Family Caregiver Lead	1/1/21	6/30/21	
	b	Provide training and information on conducting a FCG support group	Family Caregiver Lead	7/1/21	12/30/21	
	c	Refer FCG consumers to support group	Family Caregiver Lead	1/1/22	12/30/24	
	d	Provide small stipend for supplies and snacks for first year of support group	Family Caregiver lead	1/1/22	12/30/22	

**Goal: Greater Outreach and Education to support diverse family caregivers.**

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
Communicate with key partners about ongoing supports for Family Caregivers	a	Provide RVCOG SDS printed program materials, including Family Caregiver Respite pamphlets, to community	SDS Management Team, staff	1/1/21	12/30/24	

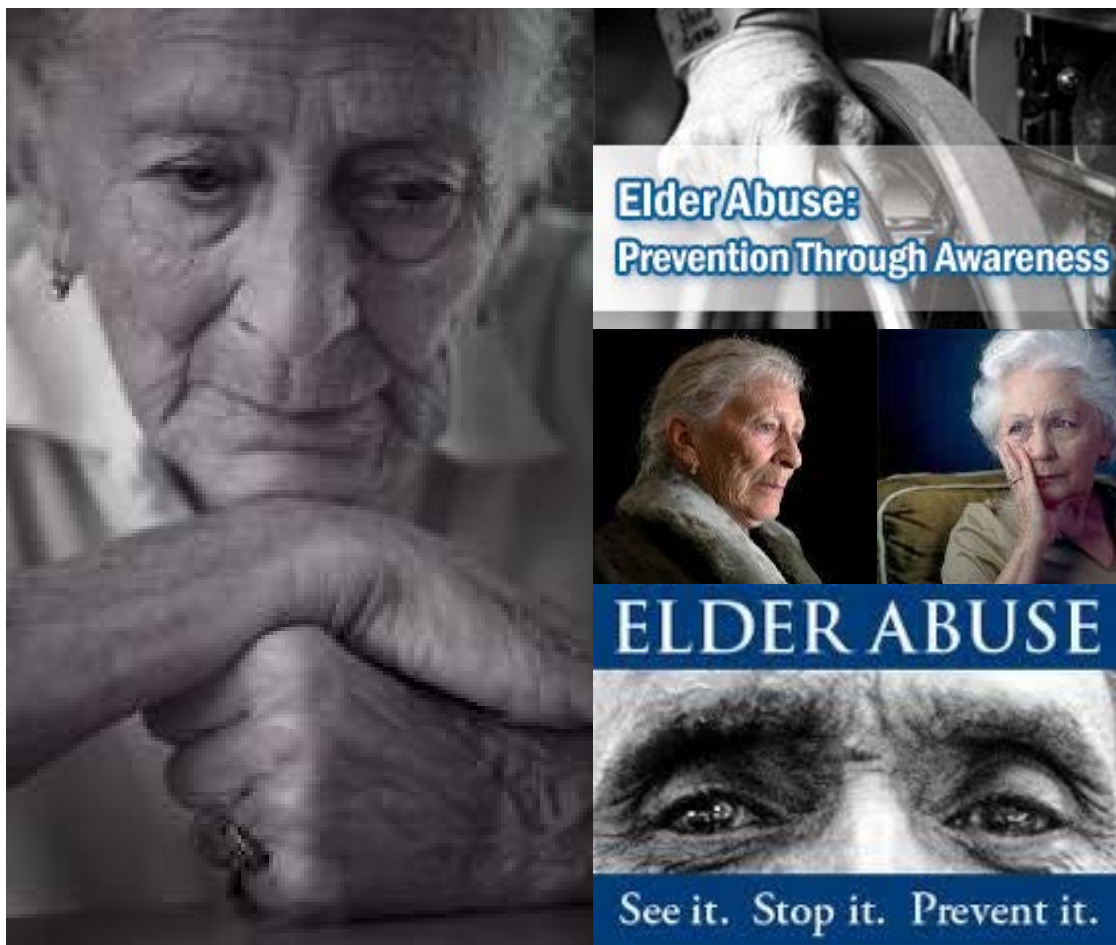
		partners.				
	b	Keep ADRC staff up to date on all available supports, including Teepa Snow and STAR-C counseling, Respite	Direct Services Programs Supervisor, ADRC and Family Caregiver Leads	1/1/21	12/30/24	
	C	Offer community presentations at churches and other local groups.	Direct Services Programs Supervisor, Family Caregiver Lead	1/1/21	12/30/24	

**Goal: Sustain Ongoing Respite Opportunities for Family Caregivers**

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
Assist family caregivers in arranging for respite through self-selected caregiver or agency caregiver	a	Maintain contracts with local in-home care providers to provide respite services for family caregivers.	SDS Management, Family Caregiver Lead	1/1/21	12/30/24	
	b	Continue to distribute updated printed materials that explain the program, including in Spanish	Direct Services Programs Supervisor, Family Caregiver Lead	1/1/21	12/30/24	
	C	Offer community presentations at churches and other local groups.	Direct Services Programs Supervisor, Family Caregiver Lead	1/1/21	12/30/24	

5. Legal Assistance and Elder Rights Protection Activities (OAA Titles IIIB and VII)

*Safety and Rights – Provide tools to protect aging individuals and individuals with disabilities from harm or abuse.*



RVCOG SDS will continue to:

- Provide an Adult Protective Services (APS) Emergency Fund to pay for such things as emergency shelter, transportation, food, medications, and clothing for seniors 60 and older in protective service situations.
- Sponsor an annual educational initiative for both professionals and the community regarding elder rights and legal assistance.
- Attend local APS Multi-disciplinary Team (MDT) meetings.
- Refer consumers who are believed to be at risk of abuse or neglect, to Adult Protective Services (APS). See APS Screening form on next page.
- Ensure that employees and volunteers of RVCOG SDS, as well as sub-contractor employees, volunteers, and direct care providers for RVCOG SDS clients are all mandatory reporters under ORS 124.050 through 124.095 and OAR Chapter 411, Division 20.

APS SCREENING FORM						
Select Date	Time		Log#		Investigator	Select
Case Type:	Select		Allegation #1	Select	Triage	Select
Access	Select	Prime	Allegation #2	Select	Screener	Select
Last Case		CM or Licensor			Time & Date In	
Facility: Self Report <input type="checkbox"/>	Facility Name:		Facility failed to:	Choose an item.		
CO	Name:		Phone:		Relation to Victim:	
	Address:		Email:			
RV	Name:		Phone:		Relation to Victim:	
	Address:		DOB:		RV	
RP	Name:		Phone:		Relation to Victim:	
	Address:		DOB:			
W1	Name:		Phone:		Relation to Victim:	
	Address:		DOB:			
W2	Name:		Phone:		Relation to Victim:	
	Address:		DOB:			

Please fill out all highlighted fields if applicable. List any additional participants and their relationship to the **VICTIM** here. Type **NARRATIVE** in this field and provide as much detail as possible. Email this form to [APDD8.APS@state.or.us](mailto:APDD8.APS@state.or.us)



Screened out by:	Select	Date:	
Peer Review by:	Select	Date:	

Goal: To provide a person/family the tools to protect themselves or their loved ones from any kind of harm, abuse, or catastrophe.

Measureable Objectives:	Key Tasks		Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update
				Start Date	End Date	
Provide at least one educational initiative annually for both professionals and the community regarding elder rights and legal assistance.	a	Work with SAC, APD APS staff, and MDT on an annual basis to identify potential educational initiatives and implement.	SAC and staff	1/1/21	12/31/24	<ul style="list-style-type: none"> <li>● Held third annual Elder Abuse Conference in fall of 2019. Approximately 50 participants from multiple agencies, APD, Adult Protective Services, SDS Staff, SAC members and the community attended.</li> <li>● A Fourth annual conference is planned for Fall 2020.</li> </ul>



## 6. Older Native Americans (OAA Titles VI and III)

*Ensure inclusivity, RVCOG SDS must reach out to all populations and remove any cultural and or language barriers that may exist.*



Jackson and Josephine counties are served by the Cow Creek Band of Umpqua Tribe Indians and by the Coquille Indian Tribe. Although there are about 1,000 elder Native Americans in the area, the majority belong to tribes from other parts of the state and nation. RVCOG SDS, through its participation on the Regional AAA/Tribal meetings, will continue to explore ways to make our services more responsive and attractive to Native Americans and to better coordinate services between the tribes and the AAA.

The SDS Director and/or Direct Services Programs Supervisor have attended quarterly Regional AAA/Tribal meetings starting in 2018. Through connections formed as a result of these meetings, the Area Plan survey was able to be

distributed through the Klamath and Cow Creek tribes to their members living in Jackson and Josephine counties. As a result, RVCOG SDS received more than a dozen completed surveys from both Klamath tribal members and Cow Creek tribal members.

Although there are few tribal members from any one group in our counties, the agency will continue to attend these joint meetings and collaborate with any neighboring AAAs and Tribes.

Goal: To ensure inclusivity, RVCOG AAA must reach out to all populations and remove any cultural and or language barriers that may exist.

Measureable Objectives:	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
Continue outreach to the Native American population in the area	a	Continue relationships with Native American organizations in the area.	SDS Director, SDS Direct Services Programs Supervisor	1/1/21	12/30/24	
	b	Provide information to Native American organizations about RVCOG AAA services through presentations, brochures, and/or electronic outreach efforts.	SDS Director, Direct Services Programs Supervisor	1/1/21	12/30/24	
	c	Attend any Tribal/AAA gathering or event in other counties .	SDS Director, Direct Services Programs Supervisor	1/1/21	12/30/24	
	d	Research and add Native American resources to ADRC	ADRC Lead	1/1/21	12/30/24	

## 7. Behavioral Health

*Provide resources and services that help provide a better quality of life.*



As our population ages, there is a greater need for behavioral health services, especially in Southern Oregon, where older adults make up a higher percentage of our population than is the case in the rest of the state. Although most older adults rely on Medicare to cover their healthcare needs, both Medicare behavioral health coverage and Medicare behavioral health providers are severely limited.

Recognizing this need, RVCOG SDS has developed and implemented several behavioral health programs to address the issues of depression, social isolation, and other behavioral health challenges facing older adults in our area.

- Buried in Treasures – Designed to address hoarding disorder and acquiring behavior, this workshop helps participants learn the skills to de-clutter and mitigate the drive to acquire. This 16-week course helps improve the training participant’s life, increases their safety, and creates more living space for them and for their family. This group is held once per week for two hours and offers a judgement-free environment for people ready to make a change in their life.
- Older Adult Behavioral Health Initiative (OABHI) – This investment has placed professionals who specialize in behavioral health for older adults in local and regional community mental health programs. RVCOG SDS employs an Older Adult Behavioral Health Specialist (OABHS) who provides behavioral health training and complex case consultation, and addresses system barriers to care.
- Dementia Training – Teepa Snow: Positive Approach to Care trainings assist care partners (agencies, care providers, professionals) to better respond to the needs of individuals living with dementia. These trainings are provided as part of the Older Adult Behavioral Health Initiative.
- PEARLS (Program to Encourage Active and Rewarding Lives for Seniors) is an evidence-based treatment program for seniors with depression. PEARLS is for older adults (and all-age adults with epilepsy) with minor depression. This brief intervention program is delivered in the home with 8 visits and 4 follow-up calls over a period of 6 to 8 months.
- Addressing Social Isolation – The RVCOG SDS Food & Friends Program not only provides much needed nutrition to seniors and the disabled in our community; it is also a source of face to face connection for lonely and

socially isolated individuals. Too often, the meal delivery volunteer is the only person that an individual may interact with in a given day.

RVCOG SDS is also engaged in creating alternative programs to help address the need for greater behavioral health resources, such as our OPAL (Options for People to Address Loneliness) program. Using behavioral activation, action planning, and resource identification through Options Counseling, OPAL counselors provide support and encouragement in order to reduce stress, anxiety, depression, and feelings of loneliness and isolation. We are developing this program using a COVID ADRC/ACL Section 6 grant.

**Focus Area – Behavioral Health**

**Goal: Increase dementia support for people living with dementia and their caregivers**

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update
			Start Date	End Date	
Deliver Dementia Trainings in a variety of community settings	a Work with local agencies to determine gaps in dementia knowledge	OABHS	7/1/20	6/30/24	
	b Develop and train community agency staff and community members	OABHS	7/1/20	12/31/24	
	c Deliver remote dementia trainings	OABHS	10/1/20	12/31/24	

**Focus Area – Behavioral Health**

**Goal: Reduce gaps and barriers for older adults to receive behavioral health treatment**

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update
			Start Date	End Date	
Identify gaps and barriers to behavioral health treatment for older adults	a Continue work with Providence Hospital to provide competent behavioral health care in the medical setting	SDS Director, SDS Direct Services Supervisor, OABHS	7/1/20	6/30/24	
	b Continue work on addressing Medicare coverage gap with community partners	SDS Director, OABHS	7/1/20	12/31/24	

	c	Create partnership with Asante to increase quality of care for behavioral health in medical settings	SDS Director, SDS Direct Services Supervisor, OABHS	10/1/20	12/31/24	
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**Goal: Improve health outcomes by offering person-centered programming to meet the needs of the most vulnerable populations in our service area.**

Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update	
			Start Date	End Date		
			Develop and offer OPAL (Options for People to Address Loneliness)	a		Develop program, measurable outcomes, data tracking,
	b.	Develop outreach materials, outreach plan and education about program	SDS Director, Direct Services Supervisor, Behavioral Health staff	10/1/2020	12/31/2021	
	c.	Work with Oregon Wellness Network to establish CMS billing procedures.	Direct Services Supervisor	1/1/2021	12/31/2021	



Measureable Objectives	Key Tasks	Lead Position & Entity	Timeframe for 2021-2024 (by Month & Year)		Accomplishment or Update
			Start Date	End Date	
Continue to offer PEARLS and Buried in Treasures	a. Maintain a small ongoing PEARLS program	Direct Services Programs Supervisor, Behavioral Health staff	1/1/2021	12/31/2024	
	b. Offer Buried in Treasures class as soon as in-person classes become possible	Direct Services Supervisor, Behavioral Health staff	1/1/2021	12/31/2024	
	c. Work with Oregon Wellness Network to establish any possible CMS billing procedures.	Direct Services Supervisor	1/1/2021	12/31/2021	

## SECTION D - OAA/OPI SERVICES AND METHOD OF SERVICE DELIVERY

### D- 1 Administration of Oregon Project Independence (OPI)

#### **Types and Amounts of Authorized Services**

The following services are offered in both OPI and OPI Pilot programs, based on the best mix of services to meet the Consumer’s needs: Home Care, Personal Care, Service Coordination, Home Delivered Meals, Chore Service, Assistive Technology, Adult Day Services, Evidence-Based Health Promotion programs, Options Counseling, and Assisted Transportation. Amounts of authorized services are determined by local priorities (see section “Prioritizing OPI Service Delivery” below), safety of care plan, best mix of services to meet Consumer need, and the most cost-effective service options, including natural supports. The maximum hours of Home and Personal Care that can be assigned to an OPI Consumer is 25 hours per month, and to an OPI Pilot Consumer is 34 hours per month. Exceptions to the maximum can be approved for short term situations of no more than six weeks. Other services may be authorized by the assigned Service Coordinator in consultation with the Direct Services Programs Supervisor, depending on Consumer need and available funds.

#### **Cost of Authorized Services per Unit**

Unit cost per service is as follows, as of July 1, 2020

Home Care—Contracted:	\$21.42/hour (Addus); \$22.06/hour (AllCare)
Personal Care—Contracted:	\$24.20/hour (Addus); \$24.93/hour (AllCare)
Home Care Worker:	\$19.89/\$20.44/\$21.00, depending on training
Home Delivered Meals:	\$11.75/meal
Assistive Technology:	Variable, depending on item needed
Service Coordination / Options Counseling:	\$61.74/hour in previous document)

## **Timely Response to Inquiries for Service**

The following Priorities for OPI Service Coordinators have been established for RVCOG SDS, and staff will schedule work to be completed based on these priorities. The SDS Lead Service Coordinator under supervision of SDS Direct Services Programs Supervisor periodically monitors for compliance.

- 1) Priority 1: Intake and Establishment of Services
  - a) Intake paperwork of eligible consumers will be completed and signed within 5-7 days of consumer contact (whether from current referral or Waitlist (see below)). Paperwork includes:
    - i) OPI Service Agreement (SE287L), including signatures of consumer and service coordinator, updated annually
    - ii) OPI Fee Determination (SE287K), updated annually
    - iii) Authorization for Disclosure, Sharing, and Use of Individual Information (ME3010), updated annually
    - iv) Home Care Worker Compensation Agreement, 354, annually or as needed
    - v) Representative Choice (SE737) if hiring a Home Care Worker, annually
    - vi) HCW/In-Home Agency Service Authorization (546N), annually
    - vii) Task List (598) completed and mailed to consumer/employer representative if using a HCW, annually or as needed
    - viii) Home Care Worker Notice of Authorized Hours and Services (4105) completed and mailed to HCW, annually or as needed
    - ix) Notice of Privacy Practices (MSC2090) given to Consumer, once
    - x) Acknowledgement of Receipt (MSC2092) from Consumer, once
  - b) Establishment of services will begin as soon as possible after timely completion of intake paperwork

- 2) Priority 2: Maintain Waitlist  
In the event that funding does not allow addition of new Consumers, a Waitlist will be maintained in the following way:
  - a) Designated Service Coordinator completes new Waitlist Tool (MSC2549B) for referrals within 3 business days of referral
  - b) Consumer information and outcome of Waitlist Tool is recorded in OACCESS and RTZ within 3 days of Waitlist Tool assessment
  - c) Consumers will be prioritized according to highest need, as shown by Waitlist Tool, and for those with equal score, will be prioritized according to first-come-first-served
  - d) Waitlisted OPI Consumers will be offered Options Counseling to address their current needs
- 3) Ongoing OPI Consumer Services
  - a) Reviews of Consumer will be completed annually on or before due date
  - b) Narration of any activity will be completed within 3 business days
  - c) Monthly OPI unit meetings will be held to staff issues, share information and education
  - d) OPI core curriculum/training will be completed by all service coordinators as soon as possible after hiring
  - e) Urgent OPI Consumer calls will be returned within 24 hours
  - f) Non-urgent OPI Consumer calls will be returned within 1-2 business days
  - g) Non-OPI-specific problems or concerns will be addressed by assigned service coordinator through Options Counseling and/or referral to community partners or services

### **Initial and Ongoing Periodic Screening**

When a Consumer calls the Aging and Disability Resource Connection (ADRC), or Aging and People with Disabilities (APD) Branch Office, and

requests OPI services, they are directed to the OPI Service Coordinator who will do the intake, or who is responsible for the Waitlist. The OPI Service Coordinator completes the screening or the waitlist tool, and if appropriate, completes the intake (see above) or places the person on the waitlist (see above).

Because OPI is not intended to replace the resources available to an individual from their own financial assets and natural support systems, the OPI Service Coordinator makes every effort to assist applicants in utilizing other resources before bringing them onto OPI. Persons appearing to be eligible for Medicaid are so counseled and encouraged to apply. However, OPI Service Coordinators may approve OPI for persons eligible for Medicaid who do not wish to enroll. People who are eligible for the SNAP, Qualified Medicare Beneficiary, or Supplemental Low Income Medicare Beneficiary Program may also qualify for OPI.

During the annual review visit or when there is need to reassess more often, the OPI Service Coordinator reassesses Consumer needs and resources and makes referrals as appropriate, including to Medicaid.

The OPI Service Coordinator narrates in the Consumer's file their exploration or discussion regarding other resources, including Medicaid.

### **Eligibility**

In order to qualify for OPI services, each consumer must meet the Eligibility Requirements in Oregon Administrative Rules (OAR) 411-032-000. People who qualify for and receive OSIPM and/or SSI are not eligible for OPI, and may be referred to State Plan Personal Care. To assess eligibility, the assigned OPI Service Coordinator meets with the applicant to complete an assessment for service eligibility, including assessing the individual's needs, resources, natural supports, and eligibility for the program. OPI staff use the Oregon Access (OACCESS) Consumer Assessment/Planning System (CA/PS) assessment tool to determine Consumer's Service Priority Level

(SPL). Consumers who are at or below SPL 18 are eligible for OPI as long as they meet other requirements, i.e., income guidelines.

### **Service Provision**

The OPI Service Coordinator, the Consumer, and the Consumer's family, if available, work together to develop a Care Plan to meet the needs of the Consumer and determine the best option for service provision. Depending on availability of OPI services, and within RVCOG SDS budget allocations, a Consumer may be authorized a mix of services that best meets the Consumer's needs. (See section **Prioritizing Service Delivery**, below.)

Home Care and Personal Care services are provided either through the use of a State Home Care Worker (HCW) or through a contracted in-home agency. Currently the agency is contracted with Addus Healthcare, Inc., and AllCare Homecare. The Consumer is responsible for making a decision to use an agency or a HCW, with support and information from the Service Coordinator. If needed, home-delivered meals are provided by the Food & Friends Senior Meals Program. Options Counseling and Service Coordination are provided by RVCOG SDS staff. Assistive Technology is purchased as needed, on a limited basis through a variety of vendors depending on the item, consumer choice, and price.

### **Prioritizing Service Delivery**

An AAA may establish local priorities for OPI authorized services, although the AAA's local priorities cannot conflict with OAR 411, Division 32. In the event of a grievance, the OAR takes precedence over local priorities. The current priorities of RVCOG SDS are as follows:

- 1) **Maintaining Current Consumers:** Maintaining Consumers already receiving authorized service as long as their condition indicates they qualify for the program (with a Service Priority Level between 1 and 18). Prioritized services are Home Care, Personal Care, and Service Coordination, and in addition, for

OPI Pilot consumers, Home Delivered Meals. Other services may be approved if the budget allows by authorization from the Direct Services Programs Supervisor. These may include Home Delivered Meals for regular OPI Consumers, Chore Service, Assistive Technology, Adult Day Services, Evidence-Based Health Promotion programs, Options Counseling, and Assisted Transportation. The Consumer has the primary responsibility (with OPI Service Coordinator's guidance) for choosing and whenever possible developing the most cost-effective service options. The maximum units of In-Home service per eligible OPI 60+ individual per month is up to 25 hours per month for both Home Care and Personal Care. For OPI Pilot (under 60) individuals, the maximum units of In-Home services are 34 hours per month. At their October 25, 2017 meeting, the RVCOC SDS Board approved "grand fathering" in a handful of OPI 60+ clients (approximately 23) who previously received more than 25 hours/month of service. Other exceptions to the maximum hours per month maybe approved for short-term situations of no more than six weeks.

- 2) **Maintaining and prioritizing a Waitlist:** When adequate funding to bring on new Consumers to OPI services is not available, the OPI Service Coordinator will continue to accept applicants for OPI service and will complete the Waitlist Tool for each referral. They will inform the Consumer of the lack of OPI funds at this time and inform them that they will be notified by the OPI Service Coordinator when their name has come up on the Waitlist and there is money to provide services to them. The minimum information needed for the Waitlist is the Consumer's full name, address, phone number, and at least the last 4 digits of the person's SSN (when individuals are willing). Individuals are placed on the Waitlist with those having the lowest Service Priority Level at the top of the list,

descending to those with the highest Service Priority Level (see OAR 411-015-0010). If two or more people score the same on the priority scale, priority will be given on a first-come-first-served basis. The OPI Service Coordinator will offer Information and Referral services or Options Counseling for individuals who are placed on Waitlist but need immediate assistance.

### **Denial, Reduction, or Termination of Services**

In some instances, a Consumer will be denied or terminated from OPI services, or have their services reduced.

Denial of services for a new applicant will be based on whether they qualify for OPI according to the CA/PS assessment. If they do not qualify for services, they will be informed of this in writing. Denial of a requested service for a current Consumer will be based on the CA/PS assessment, the inability to create a safe Care Plan, or lack of available funds.

A current Consumer may have their services reduced if their annual or other reassessment indicates a reduced need for services. A current Consumer in the OPI program may have services terminated in the following instances:

- 1) **Unsafe Care Plan:** If the maximum number of allowable hours of Home and Personal Care, along with other supporting services that can be approved based on availability and budget, result in an unsafe Care Plan, the Consumer will be counseled by the OPI Service Coordinator about their concerns and strongly encouraged to utilize other services in the community. The OPI Service Coordinator will thoroughly narrate in the Consumer file their discussion regarding the unsafe Care Plan. If Care Plan remains unsafe, Service Coordinator will staff the case with Direct Services Programs Supervisor, and make any additional relevant referrals (APS, APD offices, mental health, etc.). If situation cannot be made safe with



available OPI services, local resources, and natural supports, the consumer may be deemed inappropriate for the program and terminated.

- 2) **Unsafe Working Conditions:** If the Service Coordinator determines that the Consumer cannot provide a safe or harassment-free work environment for the Home and Personal Care worker, the Service Coordinator will staff the situation with the Direct Services Programs Supervisor, and the Consumer may be terminated from the program.
- 3) **Non-Use of Program:** If the Consumer has not used program services for a continuous 30-day period, they will be reassessed for OPI eligibility and, if appropriate, terminated from the program.
- 4) **Turnover of Caregivers:** If the Consumer turns over or rejects five in-home caregivers within a 3-month period without an apparent valid reason, the situation will be staffed with the Lead Service Coordinator. The Lead Service Coordinator will discuss the situation with the Consumer and inform them that they may be terminated from the program if the turnover or rejection of caregivers continues. If the turnover or rejection of caregivers continues, the situation will be staffed with the Direct Services Programs Supervisor, and the Consumer may be terminated from the program.
- 5) **No Longer Qualifies:** If the annual or other reassessment indicates that the Consumer no longer qualifies for the program based on the CA/PS assessment, the Consumer will be terminated from the program.

A Consumer may have their services reduced if their reassessment, whether annual or for a change in circumstances, indicates a safe care plan with reduced services based on the CA/PS assessment.

Note: During the COVID-19 Emergency Declaration time period, no consumer will have services reduced or closed if the virtual reassessment Service Priority Level indicates a reduction or closure of services (see Policy Transmittal APD-PT-20-082). In such cases, an Administrative Extension of services at the current level will be requested and narrated in OACCESS.

### **Notice to Applicant or Consumer of Decision to Deny, Reduce, or Terminate OPI Service**

When an OPI Service Coordinator determines that an applicant for OPI service will not be provided a requested service, or service will be reduced or terminated, the Service Coordinator shall provide to the applicant, by mail, a written notice within 10 days of this decision. This notice shall state the specific reason(s) for this decision and shall describe the applicant's appeal rights (see below), including the deadline for submitting an appeal and the form for filing such an appeal. Change in service level or termination from services will not be effective until 10 business days after the notification is sent, except in the instance of Unsafe Work Environment, in which case services may be reduced or terminated immediately.

All written notices to Deny, Reduce or Terminate OPI Service should include information listing possible alternative services or referrals that could assist the Consumer, including Options Counseling services to assist with transition planning.

Copies of all written correspondence to the Consumer should be placed in the physical file and narrated in OACCESS.

### **Appeals and Grievance Process**

This procedure is designed to address and resolve Consumer concerns related to the provision, denial, reduction, or termination of OPI services by RVCOG SDS.

- 1) Guidelines and Definitions:
  - a) Appeal: filed by a Consumer who wishes to appeal RVCOG SDS decisions which result in a reduction, termination, or denial of OPI services.
  - b) Grievance: filed formally or informally to resolve a difference in opinion between a Consumer and SDS RVCOG SDS, for example, a process concern or customer service complaint.
  - c) Representation: The Consumer may be represented at any stage in the appeal process by a representative of the Consumer's choosing, including legal counsel. All costs related to representation shall be at the Consumer's expense. (Free legal counsel may be available from: Oregon Public Benefits Hotline – 1-800-520-5292; Center for NonProfit Legal Services, 225 W. Main Street, Medford, OR 97504, 541-779-7292 or Oregon Law Center, 424 N. W. 6th Street, #102, Grants Pass, OR 97526, 541-476-1058.)
  - d) Written Decision: A decision, rendered at any level, shall be in writing, setting forth the decision and the reason for it. The decision shall be promptly mailed to the Consumer or representative.
  - e) Time Limits: It is important that an appeal be processed as rapidly as possible. Specified time limits may, however, be extended by mutual agreement between the person who is filing the appeal/grievance and RVCOG SDS. If documentation is not submitted by the Consumer or their representative within the time limit established by this procedure, the appeal shall become void. If RVCOG SDS fails to respond to a procedural step within the established timeline, the Consumer or their representative may proceed to the next step of the process within the specified time line for it.
  - f) Definition of the term "day": A "day" shall mean a business day. If a due date falls on a weekend or an RVCOG SDS holiday (list follows), the due date shall be the next business day.

When an RVCOG SDS holiday falls on a Saturday, it will be observed on the preceding Friday. When an RVCOG SDS holiday falls on a Sunday, it will be observed on the following Monday.

New Year's Day  
Martin Luther King Jr. Day  
President's Day  
Memorial Day  
Independence Day  
Labor Day  
Veteran's Day  
Thanksgiving Day  
Day following Thanksgiving  
December 24  
Christmas Day

- 2) Filing a Grievance:
  - a) Ideally, differences of opinion between a Consumer and RVCOG SDS should be resolved informally, at the lowest level possible. A suggested first step is for Consumers to share their concern in writing or verbally to the OPI Service Coordinator. Service Coordinators should schedule a meeting to attempt to resolve such concern within 5 business days.
  - b) If the Consumer or his/her representative does not find a suitable resolution after requesting a meeting with their OPI Service Coordinator, or if they wish to forgo this first step, they should file a Grievance with the SDS Direct Service Programs Supervisor. A grievance can be filed formally using the provided form or can be done informally by contacting the Direct Services Programs Supervisor by phone at 541.423.1388.

- c) Upon receiving either an informal or formally submitted Grievance, the SDS Direct Service Programs Supervisor will review the complaint, interview the involved SDS staff, contact the Consumer, and conduct any other necessary steps to determine a potential resolution. A written response to the grievance will be written and mailed to the Consumer and/or Representative within 10 business days of receipt of the Grievance.
- 3) Filing an Appeal for denial, reduction, or termination of services:  
The Consumer or their representative must file a written notice of appeal with RVCOG SDS at the address below within 10 days of the mailing of the notice of contemplated action which is the subject of the appeal.

RVCOG SDS Director  
P. O. Box 3275  
155 North First Street  
Central Point, OR 97502

- a) If a Consumer files an appeal with RVCOG SDS, their benefits will continue during the appeal process, except in the case of termination for Unsafe Working Conditions, in which case program service will end immediately upon verbal notification.
- b) Upon the receipt of a written notice of appeal, RVCOG SDS shall schedule an appeal review meeting. This meeting shall be scheduled within 10 days of the receipt of the appeal. The Consumer and their representative (if any) shall be notified by mail of the date, time and location of the meeting. This notice shall contain the following additional information:

- i) The name and phone number of the RVCOG SDS staff member to contact for additional information about the contents of the notification letter.
  - ii) Notification of the Consumer right to continue receiving OPI service while he/she is awaiting the outcome of RVCOG SDS appeal review.
  - iii) Information on the Consumer rights at the appeal review, including the right to representation and the right to have witnesses testify on their behalf.
  - iv) Information on the Consumer right to seek an administrative review by ODHS of the outcome of RVCOG SDS appeal review.
- c) The appeal review meeting shall be held at the date, time and location specified in the appeal meeting notification letter. To encourage impartiality, the review shall be conducted by the RVCOG SDS Direct Services Programs Supervisor.
- d) Within five (5) days of the conclusion of this meeting, the RVCOG SDS Direct Services Programs Supervisor shall inform the Consumer or representative, as appropriate, of a decision in writing regarding this matter. Upon notification, services will be terminated immediately.
- e) Within 5 days of receipt of the decision, the Consumer or their representative may contact the RVCOG SDS Director to request a review of the decision. The SDS Director will complete their review and make a final decision within five (5) days of the request. During this review, services will not be reinstated. The SDS Director will review the written documentation and may contact the eligible individual or their representative, for additional clarification. The SDS Director decision shall be binding unless the aggrieved Consumer or his/her representative wishes to pursue this matter with the Oregon Department of Human Services.

- f) The Consumer or their representative who wishes to request an administrative review hearing with ODHS may do so following the conclusion of RVCOG SDS's appeal review process. The hearing request should be sent to the Hearing Officer Panel, P.O. Box 14020, Salem, Oregon, 97309-4020. A copy of the hearing request should also be sent to the Department's Aging and People with Disabilities (SPD) Administrator at 500 Summer Street, N. E., Salem, OR 97310-1015. In the event ODHS decides against RVCOG SDS as a result of their review, the Consumer will be eligible for reinstatement of service at the time of ODHS's decision.

### **Fees for Services**

At the time of intake or review, the OPI Service Coordinator completes an OPI Fee Determination Form 287k. The Service Coordinator asks the applicant how much of their monthly income is from Social Security, pension, interest on savings, investments, property rentals or other income sources and enters this information on the 287K form. The Service Consultant then asks the Consumer what their medical expenses are on a monthly basis. This information is categorized under medicines, medical supplies, medical equipment, doctor and/or hospital bills, monthly cost of supplemental health insurance, and other medical expenses. This is also documented on the 287K. The total amount of monthly medical expenses is subtracted from the monthly income amount and entered on the form. The balance or "Net Monthly Income" is used to determine the Consumer's OPI fee for services. The Service Coordinator determines the fee by using the OPI Sliding Fee Scale and taking into consideration whether the Consumer is living in a single-person up to a four-person household. The fee amount including "0" is recorded on the 287K which the Consumer signs and on the SDS 546. A copy of the SDS 546 is sent to RVCOG SDS's NAPIS Office Specialist who sets the services up in OACCESS and posts units of service

from the monthly In-Home Service Provider billing, Homecare Worker report, Food and Friends Report, and Service Coordinator report.

### **Minimum One-time Fee**

A \$25.00 one-time minimum fee is applied to all individuals receiving OPI services who have adjusted income levels at or below the federal poverty level (everyone who does not pay a fee for service). The fee is due at the time eligibility for OPI service is determined.

RVCOG SDS is opting to apply the \$25.00 fee to Service Coordination services.

At the time of initial assessment, the OPI Service Coordinator will inform the Consumer, as appropriate, that they will be assessed a \$25.00 fee and that a statement will be sent along with an envelope within the next 30 days. When the Service Coordinator gives the Consumer the OPI Service Agreement 287L, it explains the \$25.00 and documents that services have been authorized.

The OPI Service Coordinator writes on the monthly case management report form that a \$25.00 one-time fee needs to be billed. The OPI Service Coordinator sends the form to the NAPIS Office Specialist. The NAPIS Office Specialist prepares and mails a letter/invoice to the Consumer along with a return envelope requesting a check. A follow-up letter/invoice is not mailed if the Consumer does not pay. A Consumer does not lose service if they do not pay the minimum one-time fee.

The NAPIS Office Specialist maintains billing and payment information on a separate spreadsheet (not in the NAPIS billing system) and reports any income billed and collected to the RVCOG SDS Finance Office on a monthly basis for inclusion on the Monthly SDS 148 Oregon Project Independence (Adults 60 + or -60 with Alzheimer's or Related Dementia; Pilot for Adults with Disabilities Aged 19-59) Cumulative Financial and Services Reports.

### **Non-Payment of Fees**



Each month the NAPIS Office Specialist sends OPI Service Coordinators copies of the billing letters that have been sent to the Consumer. The OPI Service Coordinators review the letters to check on each Consumer's payment status. In addition, the NAPIS Office Specialist contacts the OPI Service Coordinator when she notices that a Consumer is 60 days past due. The OPI Service Coordinators are responsible for contacting Consumers who are more than sixty days in arrears in payment of fees or owe more than \$20 in fees. If payment is not received within thirty days, the Service Coordinator staffs the case with the SDS Direct Services Programs Supervisor to determine what action may be needed. When it is determined that fees are to be written off, the OPI Service Coordinator notifies the NAPIS Office Specialist in writing and the balance due is zeroed out.

### **Monitoring and Evaluation**

The SDS Direct Services Programs Supervisor and Lead OPI Service Coordinator at least annually reviews a sample of cases to determine if service eligibility, determination of services and fees for services are being determined appropriately. A monthly report of service expenditures is provided by the SDS Direct Services Programs Supervisor to OPI Service Coordinators and SDS Lead Service Coordinator for their use in staying within budget. At least once during the current In-Home contract solicitation cycle, the provider is monitored to assure they are meeting contractual requirements. The SDS Direct Services Programs Supervisor, SDS Lead Service Coordinator and OPI Service Coordinators meet at least once every two months to review budgets. At that time, they also review service delivery and staff issues. The SDS Lead Service Coordinator maintains daily contact with OPI Service Coordinators to problem solve and assure Consumer needs are being met. The SDS Lead Service Coordinator keeps the SDS Direct Services Programs Supervisor apprised of program issues on a regular basis. SDS Director and SDS Direct Services Programs Supervisor meet regularly to address status of expenditures and budget.

## **Conflict of Interest Policy**

There is no direct provision of services for OPI Consumers for which a fee is set.

D- 2 Services provided to OAA and/or OPI Consumers

**SERVICE MATRIX and DELIVERY METHOD**

#1 Personal Care (by agency)

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Addus HealthCare, Inc.  
Barbara Walch, 541-857-9899;bwalch@addus.com  
1240 N Riverside Avenue  
Medford, OR 97501  
Addus is a "for profit agency."

All Care In-Home Care Solutions  
Ali Dean, 541-857-9195, ali@allcaremedford.com  
255 West Stewart Avenue, Suite 101  
Medford, OR 97501  
All Care is a "for profit agency."

Note if contractor is a "for profit agency"

**#2 Homemaker** (by agency)

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Addus HealthCare, Inc.  
Barbara Walch, 541-857-9899; bwalch@addus.com  
1240 N Riverside Avenue  
Medford, OR 97501  
Addus is a "for profit agency."

All Care In-Home Care Solutions  
Ali Dean, 541-857-9195, ali@allcaremedford.com  
255 West Stewart Avenue, Suite 101  
Medford, OR 97501  
All Care is a "for profit agency."

Note if contractor is a "for profit agency"

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**#2a Homemaker** (by HCW) Funding Source: OAA OPI Other Cash Funds

**#4 Home-Delivered Meal**

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

RVCOG SDS through its Food & Friends Senior Meals Program provides program oversight and management of the home-delivered meals delivery system.

The agency contracts for meal preparation, a driver/kitchen supervisor for the Josephine County Central Kitchen and two Jackson County drivers with:

TRIO Community Meals

Magi Brettler, Vice President

101 Pine Park Drive

Lafayette, LA 70508

Office: 337-593-0433, ext. 3

Cell: 337-319-8850

Fax: 225-208-1504

TRIO Community Meals is a "for profit agency"

Note if contractor is a "for profit agency"

**#6 Case Management (Service Coordination)**

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#7 Congregate Meal**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

RVCOG SDS through its Food & Friends Senior Meals Program provides the congregate meals program oversight and management of congregate meals sites.

The agency contracts for meal preparation, a driver/kitchen supervisor for the Josephine County Central Kitchen and two Jackson County drivers with:

TRIO Community Meals  
Magi Brettler, Vice President  
101 Pine Park Drive  
Lafayette, LA 70508  
Office: 337-593-0433, ext. 3  
Cell: 337-319-8850  
Fax: 225-208-1504

TRIO Community Meals is a "for profit agency"

Note if contractor is a "for profit agency"

**#10 Transportation**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Rogue River Community Center  
132 S. Broadway, P. O. Box 295  
Rogue River, OR 97537  
Melissa Shreeves, Executive Director  
541-582-0609

Note if contractor is a "for profit agency"

**#11 Legal Assistance**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Jackson County:

Center for NonProfit Legal Services  
225 W. Main Street, P. O. Box 1586  
Medford, OR 97501  
Debra Lee, Executive Director  
541-779-7292; debralee@cnpls.net

Josephine County:

Oregon Law Center  
424 N. W. 6th Street, Suite 102, P. O. Box 429  
Grants Pass, OR 97528  
Eric Dahlin, Executive Director  
541-476-2154; edahlin@oregonlaw.org

Note if contractor is a "for profit agency"

**#12 Nutrition Education**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#13 Information & Assistance (ADRC)**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Rogue River Community Center  
132 S. Broadway, P. O. Box 295  
Rogue River, OR 97537  
Melissa Shreeves, Executive Director  
541-582-0609

Note if contractor is a "for profit agency"

**#16/16a Caregiver Access Assistance**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#20-2 Advocacy**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#20-3 Program Coordination & Development**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#30-5/30-5a Caregiver Respite**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Addus HealthCare, Inc.  
Barbara Walch, 541-857-9899;bwalch@addus.com  
1240 N Riverside Avenue  
Medford, OR 97501  
Addus is a "for profit agency."

All Care In-Home Care Solutions  
Ali Dean, 541-857-9195, ali@allcaremedford.com  
255 West Stewart Avenue, Suite 101  
Medford, OR 97501  
All Care is a "for profit agency."

Note if contractor is a "for profit agency"



**#40-3 Preventive Screening, Counseling and Referral**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#40-4 Mental Health Screening and Referral**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Community Volunteer Network – RSVP

One West Main Street, Suite 303

Medford, OR 97501

Kristin Milligan, Executive Director

541-857-7784; kmilligan@retirement.org

Depends on item to be purchased, consumer choice and price.

Note if contractor is a "for profit agency"

**#40-5 Health & Medical Equipment**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Depends on item to be purchased, consumer choice and price.

Note if contractor is a "for profit agency"

**#50-1 Guardianship/Conservatorship**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Jackson County:

Center for NonProfit Legal Services

225 W. Main Street, P. O. Box 1586

Medford, OR 97501

Debra Lee, Executive Director

541-779-7292; debraleec@cnpls.net

Note if contractor is a "for profit agency"

**#50-3 Elder Abuse Awareness and Prevention**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#50-5 LTC Ombudsman**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#60-3 Reassurance**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#70-2 Options Counseling**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#70-9/70-9a Caregiver Training**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#71 Chronic Disease Prevention, Management/Education**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#80-4 Financial Assistance**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

**#90-1 Volunteer Services**

Funding Source:  OAA  OPI  Other Cash Funds

Contracted  Self-provided

Contractor name and address (List all if multiple contractors):

Community Volunteer Network – RSVP  
One West Main Street, Suite 303  
Medford, OR 97501  
Kristin Milligan, Executive Director  
541-857-7784; kmilligan@retirement.org

Note if contractor is a "for profit agency"

# SECTION E - Area Plan Budget

Area Plan Budget, Worksheet 1  
 Rogue Valley Council of Governments, District B PSA  
 7/1/20-6/30/21

Budget by Service Category

(B)		(C)					(D)							(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)	(M)	(N)
Admin	SERVICE NAME					T II B	T II C-1	T II C-2	T II D	T II E	T II F	OAA Total	NSIP	OPI	Other State-provided Funds	Other Cash Funds	Total Funds	Estimated Cost Per Unit	Comments	Explanation			
<b>ADMINISTRATION</b>						\$ 47,968	\$ 49,722	\$ 57,476	\$ -	\$ 31,238	\$ -	\$ 285,504	\$ -	\$ 41,794	\$ -	\$ 196,716	\$ 445,914						
		<b>C = Contract</b>	<b>Estimated Units</b>	<b>Unit Definition</b>	<b>Estimated Clients</b>												\$ 357,210						
20-1	Area Plan Administration	<b>D = Direct Provision</b>				\$ 60,164	\$ 49,722	\$ 57,476	\$ -	\$ 31,238	\$ -	\$ 196,700	\$ -	\$ 41,794	\$ -	\$ 147,914	\$ 445,914						
20-2	ADA Advocate					\$ 20,106	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,106	\$ -	\$ -	\$ -	\$ -	\$ 20,106						
20-3	Program Continuation & Development					\$ 47,858	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 47,858	\$ -	\$ -	\$ -	\$ -	\$ 47,858						
<b>ACCESS SERVICES</b>						\$ 432,907	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 432,907	\$ -	\$ 336,942	\$ 12,473	\$ 136,365	\$ 918,287						
6	Case Management		6952	1 hour	309												\$ 336,942			Hours: PWD-638.1 OPI-5236.5;			
10	Transportation	C				\$ 2,118								\$ 208,542	\$ 75		\$ 2,118	\$ 49		Unduplicated PWD-84 OPI-245			
13	Information & Assistance	C, D	2031	1 one-way trip	2013	\$ 143,817											\$ 143,817	\$ 70					
40-3	Preventive Screening, Counseling, and Referral	D	2369	1 session	1289	\$ 165,893									\$ 2,238		\$ 165,893	\$ 71					
40-4	Mental Health Screening & Referral	C, D				\$ 89,189									\$ 6,842		\$ 89,189	\$ #/UVU					
70-2	Options Counseling	D	176	1 hour	56	\$ 33,206											\$ 33,206	\$ 136					
<b>ATHOME SERVICES</b>						\$ 16,997	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,997	\$ -	\$ 970,022	\$ -	\$ 7,669	\$ 955,656						
1	Personal Care	C	7822	1 hour	152											\$ 940	\$ 170,367	\$ 22		Hours: PWD-324.75 OPI-4637.25; Unduplicated PWD-30 OPI-122			
2	Homemaker/Home Care	C	18539	1 hour	177										\$ 306,061	\$ 6,140	\$ 185,390	\$ 16		Hours: PWD-4815.42 OPI-14512.5; Unduplicated PWD-40 OPI-137			
2a	Homemaker/Home Care - HCW	C	2870	1 hour	177										\$ 492,544		\$ 2870	\$ 17		Hours: PWD-3506.38 OPI-19154.5; Unduplicated			
40-5	Health, Medical & Technical Assistance Equip.	C												\$ 1,000		\$ -	\$ 1,000	\$ 333					
60-1	Volunteer Services	C	60	1 hour	4	\$ 18,507											\$ 18,507	\$ 310					
<b>LEGAL SERVICES</b>						\$ 27,886	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,886	\$ -	\$ -	\$ -	\$ -	\$ 27,886						
11	Legal Assistance	C	1162	1 hour	417	\$ 27,886											\$ 27,886	\$ 28					
<b>NUTRITION SERVICES</b>						\$ -	\$ 447,497	\$ 611,282	\$ -	\$ -	\$ -	\$ 964,779	\$ 144,761	\$ 16,000	\$ -	\$ 991,640	\$ 2,018,970						
4	Home Delivered Meals	C, D	20067	1 meal	1470		\$ 447,497	\$ 611,282				\$ 964,779	\$ 144,761	\$ 16,000	\$ -	\$ 991,640	\$ 1,392,222	\$ 7					
7	Congregate Meals	C, D	3800	1 meal	1405	\$ 446,997						\$ 446,997	\$ 144,761	\$ -	\$ 32,000	\$ 623,148	\$ 15						
12	Nutrition Education	D	1728	1 session	1159	\$ 500	\$ 500				\$ 1,000					\$ 1,000	\$ 1						
<b>FAMILY CAREGIVER SUPPORT</b>						\$ -	\$ -	\$ -	\$ -	\$ 262,021	\$ -	\$ 262,021	\$ -	\$ -	\$ -	\$ -	\$ 262,021						
18	Caregiver Access Assistance	D	26	1 contact	83					\$ 130,793		\$ 130,793				\$ -	\$ 130,793	\$ 611					
28-4	Caregiver Repairs	C	4253	1 hour	73					\$ 30,000		\$ 30,000				\$ -	\$ 30,000	\$ 22					
70-9	Caregiver Training	D	213	1 session	57					\$ 39,504		\$ 39,504				\$ -	\$ 39,504	\$ 139					
<b>SOCIAL &amp; HEALTH SERVICES</b>						\$ 13,700	\$ -	\$ 28,100	\$ -	\$ 5,198	\$ 44,996	\$ -	\$ -	\$ -	\$ 189,802	\$ 246,796							
50-1	Guardianship/Conservatorship	C	129	1 hour	12	\$ 10,855				\$ -	\$ 10,855					\$ 10,855	\$ 35						
50-2	Elder Abuse Awareness and Prevention	C, D				\$ 3,135				\$ 2,100	\$ 2,100					\$ 3,135	\$ 3,135						
50-5	LDQ Outpatients	C				\$ 2,000				\$ 2,000	\$ 2,000					\$ 2,000	\$ 2,000						
67	Chronic Disease Prevention, Management & Ed					\$ 28,100				\$ -	\$ 28,100					\$ 28,100	\$ #/UVU						
600	Other - Computer Replacement Fund					\$ 2,905				\$ -	\$ 2,905					\$ 2,905	\$ 2,905						
600	Other - Veterans Directed Care Program					\$ -				\$ -	\$ -					\$ 125,948	\$ 125,948						
<b>GRAND TOTAL</b>						\$ 641,178	\$ 497,219	\$ 674,758	\$ 28,100	\$ 315,359	\$ 5,198	\$ 2,059,700	\$ 144,761	\$ 1,363,868	\$ 12,473	\$ 1,391,922	\$ 4,932,264						

<b>OAA Minimum RB Minimum Expenditures - OAA Section 307(a)(2)</b>	
Access Services	10% 69.82%
At Home Services	3% 3.00%
Legal Assistance	2% 4.50%

9/15/2021 10:50:58 AM BUDGET 2021 - All 100% includes state budget pages 09/02/2021

Section E

Area Agencies on Aging Area Plan Budget  
 AAA: District 8 AAA - SDS RVCOG  
 BUDGET PERIOD: 07/01/20 - 06/30/2021 (as of 9/9/2020)

Staffing Plan

Position Title	FTE Worked	Annual Salary (excludes OPE)	Annual OPE	Total Salary + OPE	OAA Funds	COVID-Related Funds	OPI Funds	Other Funds	Medicaid Funds Regular Allocation	Medicaid Funds Local Match	Medicaid Matched by Local Funds	Total
<b>QABHS</b>												
Older Adult Behavioral Health Specialist	1.00	\$ 61,075.66	\$ 71,619.26	\$ 132,694.92	\$ 5,528.95	\$ 23,554.86	\$ -	\$ 103,611.10	\$ -	\$ -	\$ -	\$ 132,694.92
<b>ADMINISTRATION</b>												
Office Specialist II	1.00	\$ 34,373.66	\$ 55,807.96	\$ 90,181.62	\$ 32,617.77	\$ -	\$ 12,681.79	\$ 44,882.06	\$ -	\$ -	\$ -	\$ 90,181.62
SDS Director	1.00	\$ 94,577.60	\$ 67,261.09	\$ 161,838.69	\$ 46,002.09	\$ -	\$ -	\$ -	\$ 115,836.60	\$ -	\$ -	\$ 161,838.69
SDS Planner	0.50	\$ 30,772.56	\$ 26,393.62	\$ 57,166.18	\$ 31,297.14	\$ 11,611.04	\$ 6,709.65	\$ 5,988.04	\$ -	\$ 805.16	\$ 805.16	\$ 57,166.18
SDS Operations Manager	0.67	\$ 51,625.60	\$ 39,690.54	\$ 91,316.14	\$ 71,702.46	\$ 3,536.89	\$ 16,076.78	\$ -	\$ -	\$ -	\$ -	\$ 91,316.14
Office Specialist I	0.75	\$ 23,088.00	\$ 24,597.26	\$ 47,685.26	\$ 36,382.09	\$ 3,284.98	\$ 6,322.71	\$ -	\$ 1,695.48	\$ -	\$ -	\$ 47,685.26
<b>DIRECT SERVICE</b>												
PEARLS Specialist	1.00	\$ 49,732.18	\$ 63,536.63	\$ 113,268.81	\$ 64,549.35	\$ 35,664.54	\$ -	\$ 13,054.92	\$ -	\$ -	\$ -	\$ 113,268.81
SDS Service Coordinator	0.60	\$ 26,894.40	\$ 21,621.04	\$ 48,515.44	\$ 17,474.54	\$ 3,548.81	\$ 27,492.08	\$ -	\$ -	\$ -	\$ -	\$ 48,515.44
SDS Service Coordinator	1.00	\$ 52,160.37	\$ 68,281.33	\$ 120,441.69	\$ 17,263.31	\$ 6,139.18	\$ 51,003.71	\$ 46,035.49	\$ -	\$ -	\$ -	\$ 120,441.69
SDS Service Coordinator FCG Lead	0.80	\$ 46,159.36	\$ 52,960.98	\$ 99,120.34	\$ 50,360.12	\$ 10,944.69	\$ 37,815.54	\$ -	\$ -	\$ -	\$ -	\$ 99,120.34
SDS Direct Services Program Supervisor	1.00	\$ 55,931.20	\$ 68,950.17	\$ 124,881.37	\$ 64,938.31	\$ 2,775.14	\$ 38,574.47	\$ 16,095.82	\$ 2,497.63	\$ -	\$ -	\$ 124,881.37
PEARLS Specialist	1.00	\$ 56,176.02	\$ 61,789.92	\$ 117,965.94	\$ 54,695.78	\$ 47,636.94	\$ -	\$ 15,633.22	\$ -	\$ -	\$ -	\$ 117,965.94
SDS Service Coordinator	1.00	\$ 39,686.40	\$ 62,984.65	\$ 102,671.05	\$ 43,806.32	\$ 7,186.97	\$ 51,677.76	\$ -	\$ -	\$ -	\$ -	\$ 102,671.05
SDS Service Coordinator OPI Lead	0.80	\$ 46,159.36	\$ 52,960.98	\$ 99,120.34	\$ 19,035.03	\$ 4,225.16	\$ 68,878.82	\$ 6,981.33	\$ -	\$ -	\$ -	\$ 99,120.34
SDS Services Coordinator ADRC Lead	1.00	\$ 48,145.55	\$ 66,464.65	\$ 114,610.20	\$ 92,607.99	\$ 6,874.69	\$ -	\$ 4,358.78	\$ 10,768.74	\$ -	\$ -	\$ 114,610.20
SDS Service Coordinator	0.30	\$ 16,117.92	\$ 12,428.61	\$ 28,546.53	\$ 25,389.25	\$ 3,157.27	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,546.53
SDS Service Coordinator	1.00	\$ 42,182.61	\$ 56,519.57	\$ 98,702.17	\$ 29,610.65	\$ 219.34	\$ 25,950.45	\$ 42,921.74	\$ -	\$ -	\$ -	\$ 98,702.17
<b>NUTRITION</b>												
Meal Site Coordinator - Eagle Point	0.50	\$ 13,364.00	\$ 10,847.13	\$ 24,211.13	\$ 24,211.13	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 24,211.13
Nutrition Program Outreach Coordinator	1.00	\$ 49,632.96	\$ 54,386.56	\$ 104,019.52	\$ 104,019.52	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 104,019.52
Meal Site Coordinator - Jacksonville On Call	0.01	\$ 237.54	\$ 213.40	\$ 450.94	\$ 450.94	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 450.94
Meal Site Coordinator - Merlin/Williams	0.20	\$ 5,191.68	\$ 4,273.49	\$ 9,465.17	\$ 9,465.17	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,465.17
Nutrition Program Outreach Coordinator	0.80	\$ 32,148.48	\$ 46,664.41	\$ 78,812.89	\$ 78,812.89	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 78,812.89
Meal Site Coordinator - Jacksonville	0.50	\$ 12,604.80	\$ 10,524.76	\$ 23,129.56	\$ 23,129.56	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23,129.56
Meal Site Coordinator - Ashland On Call	0.01	\$ 237.54	\$ 213.40	\$ 450.94	\$ 450.94	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 450.94
Meal Site Coordinator - Central Point	0.50	\$ 11,876.80	\$ 10,215.64	\$ 22,092.44	\$ 22,092.44	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,092.44
Meal Site Coordinator - Ashland	0.50	\$ 12,604.80	\$ 10,524.76	\$ 23,129.56	\$ 23,129.56	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23,129.56
Meal Site Coordinator - Medford	0.56	\$ 15,084.49	\$ 12,194.90	\$ 27,229.39	\$ 27,229.39	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,229.39
Nutrition Program Manager	0.17	\$ 15,149.54	\$ 10,093.14	\$ 25,182.68	\$ 25,182.68	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 25,182.68
Office Specialist III/HD Coordinator	1.00	\$ 39,108.37	\$ 47,789.25	\$ 86,897.62	\$ 86,897.62	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 86,897.62
Office Specialist III/HD Coordinator	0.88	\$ 33,196.80	\$ 50,091.07	\$ 83,227.87	\$ 83,227.87	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 83,227.87
Office Assistant	0.35	\$ 9,209.20	\$ 8,609.19	\$ 17,818.39	\$ 17,818.39	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 17,818.39
Meal Site Coordinator - Eagle Point On Call	0.20	\$ 4,892.16	\$ 4,263.18	\$ 9,155.34	\$ 9,155.34	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,155.34
VACANT	0.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Meal Site Coordinator - Cave Junction	0.30	\$ 7,562.88	\$ 6,314.86	\$ 13,877.74	\$ 13,877.74	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,877.74
Nutrition Program Operations Manager	1.00	\$ 62,732.80	\$ 50,450.98	\$ 113,183.78	\$ 113,183.78	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 113,183.78
Meal Site Coordinator - Grants Pass	0.50	\$ 12,604.80	\$ 10,524.76	\$ 23,129.56	\$ 23,129.56	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23,129.56
Meal Site Coordinator - Central Point On Call	0.20	\$ 4,892.16	\$ 4,263.18	\$ 9,155.34	\$ 9,155.34	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,155.34
Meal Site Coordinator - Central Point On Call	0.10	\$ 2,520.96	\$ 2,130.92	\$ 4,651.88	\$ 4,651.88	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,651.88
Nutrition Administration Manager	1.00	\$ 64,667.20	\$ 68,082.02	\$ 132,749.22	\$ 132,749.22	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 132,749.22
	24.69	\$ 1,184,328.40	\$ 1,296,419.25	\$ 2,480,747.65	\$ 1,535,282.12	\$ 170,360.52	\$ 343,183.76	\$ 299,512.49	\$ 130,798.44	\$ 805.16	\$ 805.16	\$ 2,480,747.65
												\$ 2,480,747.65
												\$ -

### Cash Match/In-kind Match

(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
SOURCE OF OAA CASH & INKIND MATCH FUNDS <i>Be descriptive (e.g. Donated dining space @ SC)</i>	Admin. Cash Match	Admin. Inkind Match	III B & C Cash Match	III B & C Inkind Match	OAA III E Cash Match	III E Inkind Match	TOTAL Cash Match	TOTAL Inkind Match
City Funds			\$63,000				\$63,000	\$0
Community Service Block Grant Funds			\$2,000				\$2,000	\$0
County Funds			\$167,953				\$167,953	\$0
Other Funds - Campaign for Equal Justice, Oregon State Bar Legal Service Provider Fees			\$198,331				\$198,331	\$0
Other Funds - Individual Donations			\$91,137				\$91,137	\$0
Other Funds - Food & Friends Fund Raising			\$107,890				\$107,890	\$0
Other Funds - Attorney Fees			\$28,159				\$28,159	\$0
Other Funds - Organization Donations			\$6,512				\$6,512	\$0
Grants			\$10,000				\$10,000	\$0
State Funds	\$41,794		\$23,566		\$4,407		\$69,767	\$0
United Way			\$13,135				\$13,135	\$0
Donated Staff Time, Space, Equipment, Vehicles				\$23,300			\$0	\$23,300
Volunteer Time		\$83,465		\$1,037,962		\$99,135	\$0	\$1,220,562
<b>Column Totals:</b>	<b>\$41,794</b>	<b>\$83,465</b>	<b>\$711,683</b>	<b>\$1,061,262</b>	<b>\$4,407</b>	<b>\$99,135</b>	<b>\$757,884</b>	<b>\$1,243,862</b>

(12)	(13)
SOURCE OF MEDICAID LOCAL MATCH FUNDS	TOTAL
Local Funds	\$805
<b>Column Totals:</b>	<b>\$805</b>

Notes/Comments


## APPENDICES

Appendix A - Organizational Chart

Appendix B - Advisory Council(s) and Governing Body

Appendix C - Public Process

Appendix D - Final Updates on Accomplishments from 2017-2020  
Area Plan

Appendix E - Emergency Preparedness Plan

Appendix F - List of Designated Focal Points (OAA Section 306  
(a)(3)(B))

Appendix G - Partner Memorandums of Understanding

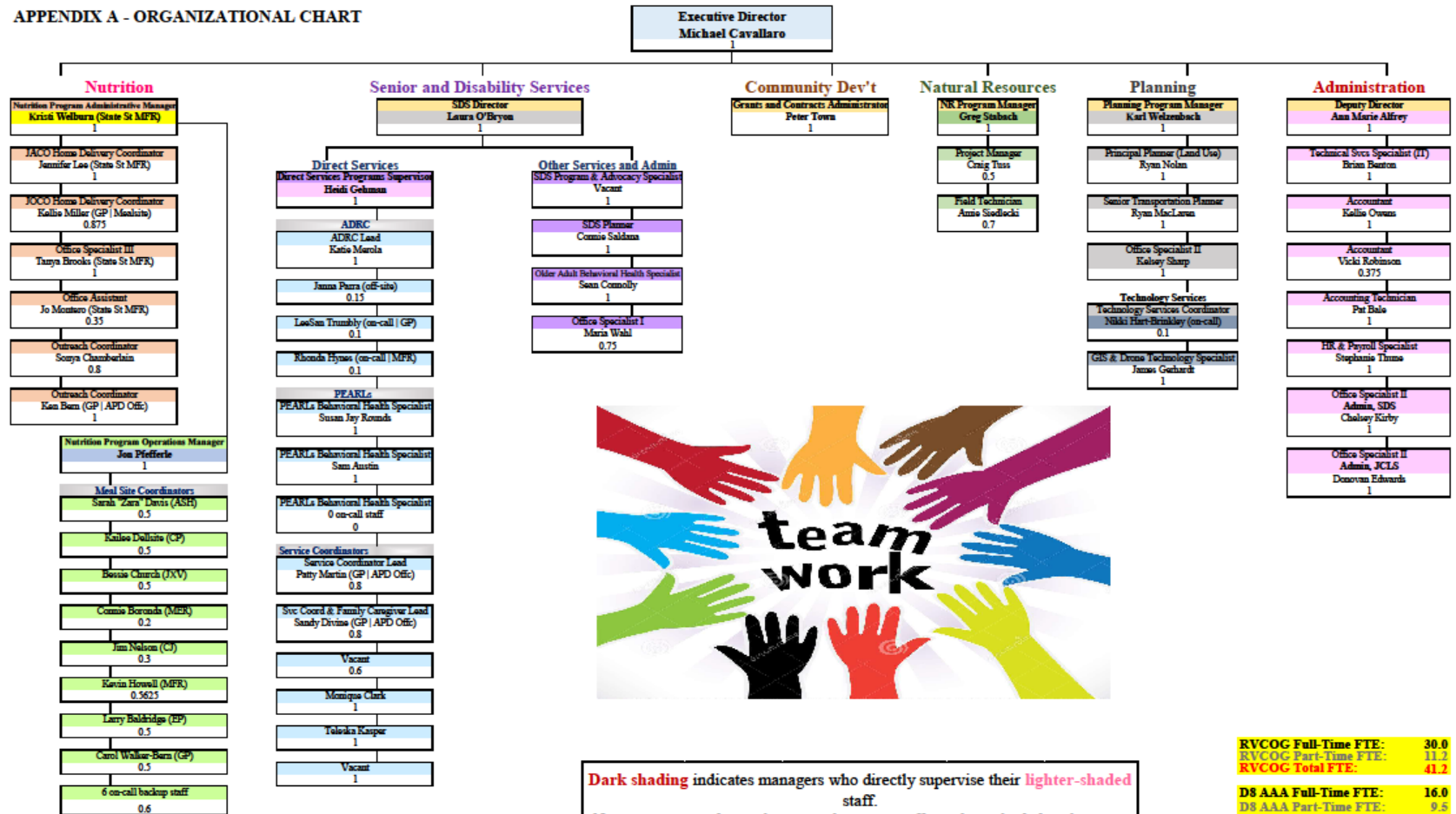
Appendix H - Needs Assessment Summary

Appendix I – Statement of Assurances and Verification of Intent

# Appendix A – Organization Chart

## Rogue Valley Council of Governments

### APPENDIX A - ORGANIZATIONAL CHART



Dark shading indicates managers who directly supervise their lighter-shaded staff.  
No supervisory relationships exist between staff members shaded in the same color.

RVCOG Full-Time FTE:	30.0
RVCOG Part-Time FTE:	11.2
<b>RVCOG Total FTE:</b>	<b>41.2</b>
D8 AAA Full-Time FTE:	16.0
D8 AAA Part-Time FTE:	9.5
<b>D8 AAA Total FTE:</b>	<b>25.5</b>

## Organizational Chart



Appendix B – Advisory Council(s) and Governing Body

<b>SENIOR ADVISORY COUNCIL</b>		
<b>NAME &amp; CONTACT INFORMATION</b>	<b>REPRESENTING</b>	<b>DATE TERM EXPIRES</b>
John Curtis	Jackson County	June 30, 2021
Rick Dyer	Josephine County Commissioner	N/A
Darin Fowler	Jackson County Commissioner	N/A
Isleen Glatt	Jackson County	June 30, 2021
Paul Golding	Jackson County	June 30, 2022
Richard Hoskins	Jackson County	June 30, 2022
John Irwin	Jackson County	June 30, 2022
Liz James	Jackson County	June 30, 2022
Pat Jenkins	Jackson/Josephine County	June 30, 2021
Rhonda Lawrence	Josephine County	June 30, 2022
Nancy Randolph	Jackson County	June 30, 2021
Linda Serra	Josephine County	June 30, 2022

**Total number age 60 or over = 10**

**Total number minority = 0**

**Total number rural = 12**

**Total number self-indicating having a disability = 2**

<b>DISABILITY SERVICES ADVISORY COUNCIL</b>		
<b>NAME &amp; CONTACT INFORMATION</b>	<b>REPRESENTING</b>	<b>DATE TERM EXPIRES</b>
Ann Marie Wolfe Lightner		
Denyce Gavin (Chair)	Jackson County	June 30, 2020
James Naegle	Jackson County	June 30, 2021
Joanna Wilson	Jackson County	June 30, 2020
John Curtis (Vice Chair)	Jackson County	June 30, 2021
Kerrie Walters	Jackson County	June 30, 2020
Patricia Alvarez	Jackson County	June 30, 2022

Total number age 60 or over = 4

Total number self-indicating having a disability = 5

## **Rogue Valley Council of Governments Board of Directors**

### **Executive Committee**

Carl Tappert, General Manager  
Rogue Valley Sewer Services

Chris Luz, Mayor  
City of Phoenix

Dick Gordon (2nd Vice President), Council Member  
City of Medford

Jim Lewis, City Councilor  
City of Jacksonville

Jody Hathaway (1st Vice President), HR/Finance Manager  
Emergency Communications 911)

Roy Lindsay (President), Councilor  
City of Grants Pass

## **Board Members**

Bill Mansfield, Board Member  
Rogue Valley Transportation District

Cathy Kemper-Pelle, President  
Rogue Community College

Cathy Shaw, Director  
Jackson County Library District (JCLDF)

Colleen Padilla, Executive Director  
Southern Oregon Regional Economic Development, Inc. (SOREDI)

Darby Ayers-Flood, Mayor  
City of Talent

Darin Fowler, Commissioner  
Josephine County

Jason Catz, General Counsel  
Southern Oregon University

Kay Harrison, Board Chair  
Rogue Valley Sewer Services

Lena Richardson, Mayor  
City of Shady Cove

Linda Spencer, Mayor  
City of Butte Falls

Meadow Martell, Mayor  
City of Cave Junction

Peter Newport, Mayor  
City of Gold Hill

Randy White, District Manager  
Jackson Soil & Water Conservation District

Rick Dyer, Commissioner  
Jackson County

Ruth Jenks, Mayor  
City of Eagle Point

Stefani Seffinger, Council Member  
City of Ashland

Taneeza Browning, Councilor  
City of Central Point

## Appendix C – Public Process

### **TO BE COMPLETED AFTER PUBLIC PROCESS IS COMPLETE**

The following is a list of the 2021-2024 Four-Year Area Plan public involvement activities that have been completed.

- The agency conducted a survey of seniors and individuals with disabilities in their counties in 2019-2020. The purpose of the survey was to better understand what services seniors need to ensure that those facing aging or disability issues, or those caring for persons with such issues, are able to live as independently as possible. A total of 745 survey forms were completed, of which 616 contained usable data. The respondents completed the survey by either filling the forms by pencil or pen, or entering responses into the survey form on the SurveyMonkey website. The survey period was October 2019 to May 2020. The respondents were identified at events where seniors gather, such as the ACCESS and Illinois Valley health fairs, Food and Friends, AARP Vital Aging Conference, Alzheimer’s caregivers, and area senior centers. The data were collected to describe the demographic characteristics of the respondents, their current living conditions, condition of their health, sources of health information and support, and needs for assistance and services. They analyzed the data and produced the attached report – See Appendix H.
- Utilized a Four-Year Area Plan Workgroup comprised of SAC and staff members to write the plan.
- Reviewed and updated the AAA’s mission and values statements with the Senior Advisory Council Executive Committee.
- Conducted interviews with key stakeholders, including: AARP, Addus Homecare, Allcare Coordinated Care Organization, Ashland Senior Center, At Home Senior Solutions, Columbia Care, Providence Medical Group - Eagle Point, Senior Options, Jackson County Housing Authority, Jackson

County Library, Jackson County Mental Health, LaClinica, Center for Non-Profit Legal Services, Medford Senior Center, OLLI - Osher Lifelong Learning Institute, Power of the Heart Dementia Care, Rogue River Assembly of God, Rollins Family Health, Valley Lift RVTD, SONAR - Southern Oregon Networking and Resource, Asante Three Rivers, Veteran's Affairs, and Valley Evangelical Church

- Conducted a public meeting to develop future Title IIIB discretionary funding priorities.
- Portland State University conducted its annual survey of ADRC consumers including Jackson and Josephine County consumers, which indicates how long it took to receive service and whether the assistance provided was sufficient for their needs.
- A December 5, 2016 public hearing was advertised in the Medford Mail Tribune, the Ashland Daily Tidings and the Grants Pass Courier – see attached Affidavits of Publications. No public members attended the hearing – see attached Sign-In sheet for the names of the three staff members that attended.
- The Senior Advisory Council reviewed the proposed Four-Year Area Plan at their December 5, 2016 meeting – see attached agenda.

REC'D DEC 06 2016

Rogue Valley Council Govt.  
PO Box 3275  
Central Point, OR 97502

Affidavit of Publication

\*\*\*THIS IS NOT A BILL\*\*\*

CASE NO.

State of Oregon  
County of Jackson

I, Cheri R. Gray, being first duly sworn, depose and say that I am the principal clerk of Medford Mail Tribune, a newspaper of general circulation, as defined by ORS 193.010 and 193.020; printed at Medford in the aforesaid county and state; that the PUBLIC NOTICE, a printed copy of which is hereto annexed, was published in the entire issue of said newspaper for 1 (One) successive and consecutive insertion(s) in the following issues 11/24/2016 (HERE SET FORTH DATES OF ISSUE)

*Cheri R. Gray*

Subscribed and sworn to before me this 2 day of December, 2016.



*Shonna Lee Zimmermann*  
NOTARY PUBLIC FOR OREGON

My commission expires 12 day of October, 2018.

Southern Oregon Media Group - Mail Tribune - Ashland Daily Tidings  
111 N Fir St  
Medford, OR 97501

PUBLICATION	EXPIRE DATE	AD CAPTION	# TIMES	AMOUNT	PO
Mail Tribune	11/24/2016	Public Notice	1 (One)	138.48	

Grants Pass  
**Daily Courier**

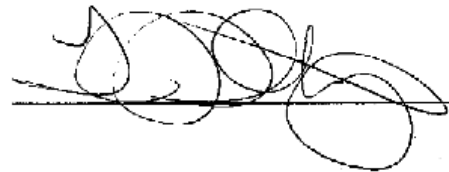
P.O. Box 1468, 409 S.E. 7th Street • Grants Pass, Oregon 97528

**AFFIDAVIT OF PUBLICATION**

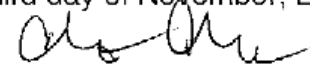
State of Oregon )  
County of Josephine ) ss.

I, Tamara Stuebing, being first duly sworn, depose and say that I am a manager of Courier Publishing Co., printer of the Grants Pass Daily Courier, a newspaper of general circulation, as defined by ORS 193.010 and 193.020; printed and published at Grants Pass, in the aforesaid county and state; that the LEGAL NOTICE, a printed copy of which is herein enclosed, was published in the entire issue of said paper, for one insertion, on the following date:

November 23, 2016.



Subscribed and sworn to before me this  
twenty-third day of November, 2016.



Notary Public of Oregon

My commission expires the twenty fifth day of  
March, 2019.

**LEGAL NOTICE**

**PUBLIC NOTICE**

Rogue Valley Council of Governments (RVOCG) is holding a public hearing from 1:30 - 10:30 a.m., Monday, December 5, 2016, in the Jackson Conference Room, Rogue Valley Council of Governments, 155 North First Street, Central Point, Oregon.

Rogue Valley Council of Governments (RVOCG) through its Senior and Disability Services (SDS) department is the designated Area Agency on Aging (AAA) for Jackson and Josephine counties.

As the AAA, SDS RVOCG is holding a Public Hearing to:

1. Review its proposed 2017-2020 Four-Year Area Plan. A complete copy of the Plan is available at the Senior & Disability Services of Rogue Valley Council of Governments' program office, 155 North First Street, Central Point, OR 97502, phone (541) 423-1384, Fax (541) 664-7927. Once a public hearing is held, comments received during the Public Hearing will be incorporated into the Plan and the Plan will be finalized and submitted to the State Department of Human Services for approval.
2. Notify the public that the AAA is utilizing \$97,177 of Older Americans Act (OAA) Title IIIB Supportive Services funds for Program Coordinator and Development services in its Fiscal Year 2017 (July 1, 2016 - June 30, 2017) budget.

A copy of the FY 2017 Older Americans Act budget is included in the proposed Four-Year Area Plan.

For more information, contact Berta Varble, SDS Operations Manager at 541-423-1384 or bvarble@rvocg.org.

B0381698 - November 23, 2016





**2017-2020 Four Year Area Plan Public Hearing**  
**9:30 – 10:30 a.m., Monday, 12/5/2016**  
**Sign In**

Name	Contact Information	60 and older? - Yes/No
Berita Varble-	PO Box 3275 Central Pt bvarble@rveog.org rveog.org	Yes
Lana O'Bryon	PO Box 3275 Central Point, OR 97502 lobryon@rveog.org	Yes
Sue Casavan	PO Box 3275 Central Point, OR 97502 scasavan@rveog.org	No



*Administration Office*  
Senior and Disability Services  
 (541) 664-6674 • FAX (541) 664-7927 • [www.rvcog.org](http://www.rvcog.org)

**Rogue Valley Council of Governments (RVCOG)  
 Senior Advisory Council**

Date/Time: 12:30 – 2:30 p.m., Monday, December 5, 2016  
 Location: Jefferson Conference Room, RVCOG, 155 N. 1<sup>st</sup> St., Central Point

**Agenda**

- 12:30 Call to Order/Attendance ..... Sandy Theis
- 12:35 General Meeting Business ..... Sandy Theis
  - a) Introductions of guests & public comments
  - b) Additions to agenda
  - c) Review and approval of November 7, 2016 Minutes
  - d) Announcements
- 12:45 Committee Reports
  - a) Executive Committee..... Sandy Theis
  - b) Council Development ..... Pat Jenkins
  - c) Outcomes & Evaluations/Nutrition ..... Jan Shipley
  - d) Communications & Outreach..... Anne Bellegia
  - e) Advocacy..... John Curtis
  - f) Disability Services Advisory Council..... John Curtis
  - g) Field Office Report ..... Kathie Young
- 1:00 Director's Report..... Laura O'Bryon
  - Michael Cavallaro, RVCOG Executive Director, announcement
  - Distribution of National Association of Area Agencies on Aging Letter (meeting handout)
- 1:15 Adult Foster Home Update..... John Curtis
- 1:30 Break
- 1:40 Area Plan Review..... Laura O'Bryon
- 2:00 Presentation on "Elderly Social Isolation: Addressing the Needs for the Invisible Senior"  
 ..... OHSU Nursing Students
- 2:20 Other
- 2:30 Adjourn Sandy Theis

***Members: Don't forget to complete Volunteer & Expense Report.***

**155 N 1st Street PO Box 3275 Central Point, OR 97502**  
*RVCOG is the designated Area Agency on Aging for Jackson and Josephine Counties providing services to seniors and adults with physical disabilities*

## Appendix D – Final Update on Accomplishments from 2017-2020

### 1. Information and Assistance Services (I&A) and Aging & Disability Resource Connections (ADRCs)

- a. Goal: ADRC is accessible and provides a sufficient level of assistance to consumers.

Actions:

- i. Establish a database of those utilizing ADRC.

The ADRC Lead and a part time Office Specialist continue to maintain the database to assure current and accurate resource information is available. There are currently approximately 340 resources listed.

- b. Goal: ADRC provides accurate and relevant information to all consumers seeking assistance in making future care decisions.

Actions:

- i. Develop training plan for all ADRC specialists which includes person-centered and service equity training. – Except for one part time ADRC staff, all other ADRC staff have completed Person Centered Options Counseling training. ADRC staff participates in state Webinars. Two ADRC staff are bilingual.

- ii. The ADRC Core Partners and the ADRC Advisory Committee meetings have been combined and now meet quarterly in February, April, August and November as a part of the Senior Advisory Council Support Services Committee meeting. The ADRC Lead provides updates and leads discussion(s) around ADRC issues.

### 2. Nutrition Services

## Actions:

Goal: Reduce older adult hunger and food insecurity. Continue to offer over yield as an additional meal for those seniors attending congregate meal sits especially in the rural areas – We do offer over yield as an additional meal.

- i. Establish partnerships with local food retailers to augment clients diet with donated fruit, vegetables, bread or protein foods. – Costco provides bread and baked goods every Wednesday for distribution in Center Point, Jacksonville and Medford, Ray’s Market provides the same of Jacksonville home-delivered meals clients. Local growers provide fresh veggies in season for congregate participants.
- ii. Maintain adequate volunteer force to meet demand for service. – Update Facebook page to increase awareness. – Facebook page has been improved. We now have 311 followers on Facebook, increasing outreach when we share posts to increase awareness and help recruit volunteers. Updated with new posts often (typically weekly). Continue to use MOWA social media and recruitment materials/tools. – Continue to use various tools to outreach for volunteer recruitment and education. – MOWA periodically offers update images, social media templates, or other materials to be used in outreach efforts. Although the Ad Council campaign has ended, the “America, Let’s do Lunch” tools is still available and utilized by individuals wishing to be referred to the MOW program in their area.
- iii. Continue to use various tools to outreach for volunteer recruitment and education. – Print ads & TV PSAs. Posters/Flyers. VolunteerMatch.org.
- iv. Establish Memorandums of Understandings MOUs with Providence Hospital in Jackson County and Three Rivers Asante Medical Center in Josephine County, as back-ups for meal production in the event that the main kitchen is not functional.

- v. MOUs have yet to be established. MOU with OSU extension Food Hero's publication to give F&F permission to publish on R&F webpage. Established and ongoing.

### **3. Health Promotion**

- a. Goal: Increase participation in evidence-based health promotion programs in the area.

Actions:

- i. Living Well Chronic Disease workshops have been put on hold since July of 2019 due to budgetary constraints; they are however, still being provided through La Clinica in the community under RVCOG SDS license.
- ii. The Diabetes Prevention Program (DPP), which started in 2019, was shift to a virtual format due to COVID-19.
- iii. Face-to-Face programs such as PEARLS were shifted to phone based programs due to COVID-19 for the last half of FY 20.
- iv. The PEARLS program is currently being conducted on a limited basis as State Mental Health Funding was discontinued at the end of FY 20.
- v. RVCOG SDS currently participates in the Oregon Wellness Network (OWN) both on the OWN Board and the OWN Operations Council. OWN is working towards a statewide billing system to establish local health care partners in each county and bill insurance programs including Medicaid and Medicare for various health promotions programs.
- vi. RVCOG SDS has delivered 3 Buried in Treasures workshops since its inception in 2018.

### **4. Family Caregivers**

A number of things impacted delivery of Family Caregiver Support Programs during the Area Plan cycle including staffing changes in 2017 and 2018 as well as COVID-19 in 2020.

- a. Goal: Assure outreach to individuals who have the greatest economic and social need.

Actions:

- i. Agency management and staff continue to identify available trainings and work with other community partners to ensure all staff are well trained and informed regarding caregiver needs and screenings.
- ii. Community outreach has been increased by agency staff to develop and implement ongoing strategies for distributing up-to-date brochures throughout the community with an emphasis on the target populations.
- iii. RVCOG SDS staff were certified as Teepa Snow Positive Approach to Care Counselors to deliver in-home interventions with caregivers caring for someone living with dementia. These counselors increase a caregiver's dementia knowledge and provide strategies and tips to make caring for a person living with dementia easier.

## 5. Elder Rights and Legal Assistance

- a. Goal: To provide a person/family the tools to protect themselves or their loved ones from any kind of harm, abuse, or catastrophe.

Actions:

- i. Held annual Elder abuse conferences in fall of 2018 and 2019. Participants included members of the community as well as multiple agencies including: APD, Adult protective services, mental health agencies, RVCOG SDS staff, and SAC members.
- ii. Another conference is planned for 2020, however it will be virtual due to COVID-19.

## 6. Older Native Americans

While there are relatively few Native Americans in this area, better outreach needs to occur to this community to ensure they are aware of the services that are available to them.

- a. Goal: To ensure inclusivity, RVCOG AAA must reach out to all populations and remove any cultural and or language barriers that may exist.

Actions:

- i. The Agency provides information to Native American organizations about RVCOG AAA services through presentations, brochures, and or electronic outreach efforts.
- ii. RVCOG SDS staff attend Regional Tribal Meetings with other agencies and representatives from local tribes in the region. These meetings are held quarterly and designed to help engage with and address needs of tribal members.

## **Appendix E - Emergency Preparedness Plan**

### **SENIOR & DISABILITY SERVICES (SDS) OF ROGUE VALLEY COUNCIL OF GOVERNMENTS (RVCOG SDS) EMERGENCY PREPAREDNESS, RESPONSE AND RECOVERY PLAN**

#### **Purpose of Plan and Office locations**

This plan outlines the actions to be taken by SDS RVCOG SDS staff in the event of a disaster that threatens the safety of employees and/or consumers and that impacts the agency's ability to carry out its day-to-day business. The plan covers SDS RVCOG SDS's Administration Office in Central Point and is a subset of the Rogue Valley Council of Government's overall Emergency Plan. The SDS RVCOG SDS plan relates to the plans of the three Oregon Department of Human Services/Adults and Persons with Disabilities (OODHS APD) field offices, as well as Food & Friends Senior Meals Program's plan.

- SDS Administration Office is located at the Rogue Valley Council of Governments, 155 N. 1st St., Central Point, Oregon 97502.
- Service Coordinators for SDS RVCOG SDS programs, as well as Food & Friends are out-stationed in two of the three APD Field Offices of Department of Human Services (ODHS) Aging and People with Disability (APD): the Medford Senior Services Office and the Grants Pass Senior and Disability Services Office. Each of these offices has both a response and a continuity of operations plan, as directed by the State of Oregon APD. SDS RVCOG SDS staff are expected to follow the immediate safety plans of those offices while present in the offices, and to follow the SDS RVCOG SDS plan for their work assignments during and after the event.
  - Grants Pass Senior and Disability Services Office, 2102 NW Hawthorn St., Grants Pass, Oregon, 97526 541-474-3110;
  - Medford Disability Services Office, 28 W. 6th St., Medford, Oregon 97501 and



- Medford Senior Services Office, 2860 State St., Medford, Oregon 97504.
- SDS RVCOG SDS interests also include the safety of Food and Friends Meal Sites and Home Delivered Meals staff, volunteers and consumers. The locations and contact information for the 15 Meal Sites are included in the Phone List as part of the Procedures document attached to this plan.

### **Assessment of Potential Hazards**

SDS leadership is aware of the Jackson and Josephine County Emergency Operations Plans, which contains thorough information and assessment of potential local hazards, including natural disasters (such as earthquake, flooding, high winds, excessive snow, and wildland fires) and other non-natural events such as hazardous materials incidents and pandemics. All of these incidents could impact SDS consumers. For detailed information regarding potential hazards in Jackson and Josephine Counties and general plans for community response, refer to these documents.

SDS employees, consumers, and visitors are at risk from various emergencies and/or hazards. The following list identifies those that would pose the greatest need for response:

- Medical emergencies
- Structural fire
- Wildland fires
- Other natural disasters, such as flooding, winter storms, periods of severe heat, extended periods of smoke
- Hazardous spills
- Violent or Criminal Behavior
- Pandemics

## **PREPAREDNESS PHASE**

**Disaster Registry and Go Stay Kit:** SDS RVCOG SDS maintains the Disaster Registry for Jackson and Josephine Counties. Vulnerable adults who cannot evacuate themselves nor stay in their own homes alone for three days may register by completing an application which is entered into a database and mapped by GIS and distributed to the local 911 Center and other response agencies. Volunteers phone everyone in the Registry once a quarter to make sure information is current and RVCOG SDS Disaster Registry and GIS staff use State licensing information, email contact with local County Developmental Disability and Mental Health residential staff, and community directory information to update both the Childcare and Residential Facilities layers of the Disaster Registry GIS Map.

SDS will distribute Go Stay Kits to all individuals registered in the Disaster Registry at the time they register, with encouragement that the registrants complete them immediately on their own or with the assistance of family members or caregivers.

**Review and Exercise of Plan, Participation in Community-wide Exercises:** SDS RVCOG SDS Management Team shall review and exercise the plan once a year through table top exercise. If the COAD or either County Emergency Managers plan a county- or region-wide exercise, SDS RVCOG SDS and, in particular, Disaster Registry staff will participate on behalf of the vulnerable populations they represent and the organization.

## **RESPONSE PHASE**

### **Notification**

SDS RVCOG SDS staff will receive notification of impending events through normal broadcast and social media as the general public receives it or other informal methods. However, Disaster Registry staff may receive specific notification through one or both County Emergency Managers. When notification is received through any medium, it should be relayed immediately to the RVCOG SDS Executive Director or SDS Director or designee, who will verify the information

and activate the SDS RVCOG SDS Emergency Plan. A current list of SDS RVCOG SDS staff may be found in Appendix i.

### **Chain of Command**

The following is the chain of command with the authority to activate the plan, with those lower on the chain of command taking authority when those higher are not available, and then transferring control once those higher become available:

- RVCOG SDS Executive Director
  - RVCOG SDS staff, all departments
- SDS Director
  - SDS Management Staff
    - SDS Staff
    - Food and Friends Program Managers
      - Food and Friends Staff, Site Coordinators, Volunteers
- APD District Manager (State Employees)
  - APD Field Office Managers
    - APD Staff

A Standing SDS Response Team will be created, with active defined roles. (See Appendix i.) In addition, a current list of contact names, office numbers and cell phone numbers will be attached to this plan and updated twice a year. (For current list, see Appendix i.)

The SDS Director has been designated as the Incident Commander on-site at the Central Point Office. She/He shall be the ranking SDS officer on site at any given time and shall be responsible for the initiation and coordination of SDS response during an emergency situation. If the SDS Director is not available, SDS District Manager will perform this role. The RVCOG SDS Executive Director or his/her designee will assign this duty.

As part of her duties, the Incident Commander shall perform, herself, or delegate:

- Assess and triage the incident
- Ensure an accurate accounting of SDS personnel on the scene
- Activate a Response Team
- Determine the activities of the Response Team
- Assign duties
- Ensure constant communication with the Response Team and SDS employees
- Activate the Disaster Registry
- Plan for the next phase of the response
- Plan for and authorize the deactivation of the response
- Serve as the Public Information Officer while at the scene, being the only person who shall provide statements to media personnel (all other SDS employees shall not provide any information or should say “no comment”)
- Coordinate with the RVCOG SDS Executive Director and other RVCOG SDS staff housed at the RVCOG SDS main office (155 N. 1st, Central Pont, OR)
- Defer to the RVCOG SDS Director for any of these duties, should the RVCOG Executive Director so order

The SDS/APD District Manager is main contact for all Field Offices. All Field Office Managers will back each other up. Salem contact is APD Field Office Manager in APD Field Service Office.

### **Communications Plan**

The Incident Commander will implement a Communications Plan, which includes the following:

- Identify key audiences. Determine who needs to be informed of the situation, and in what order (both on- and off-site)
- Communicate with staff at the RVCOG SDS main office, satellite offices and other locations, as needed
- Case Managers phone consumers identified as especially vulnerable to check their status.

When the Incident Command Team has developed a plan for response to the event, Managers will communicate the plan and assignments to their staff through phone trees or other appropriate communication method, given the urgency of the need for action.

### **Continuity of Operations Plan and Local Partner Coordination**

SDS has developed, and will continue to develop, working relationships with local emergency management personnel and agencies. SDS will continue to be involved with Jackson County Community Organizations Active in Disaster (COAD) through email and meetings to advocate for our consumers and have awareness of the plan in the event of an emergency. SDS role will be to ensure that emergency groups know about our vulnerable populations in the community and to identify resources that might be available to our clients during and after an event.

The ability of SDS to successfully continue to provide services during an emergency will depend to a large degree on the ability of SDS consumers and long-term care facilities to continue their own operations. The three SDS Field Offices provide case management, SNAP, medical & information assistance. It is essential that the services they provide be available to clients as soon as feasible after an event (continuity of operations). Each Field Office has its own emergency plan, as mandated by the State. In an emergency, where one or more location is closed, the other locations may provide service coverage. In the event all three offices and the main RVCOG SDS office are non-operational, SDS will coordinate with State level ODHS/APD department officials, other Area Agencies on Aging and local partners such as the ODHS Self-Sufficiency office, County offices, and community centers for service and business continuation.

SDS Service Coordinators will maintain a list of names and addresses of the most high risk and vulnerable clients that receive in-home long-term care services based on their care plan. This list will be updated twice a year. At the time of an event, Service Coordinators will phone their vulnerable clients for a status check. If the safety of any client is in question, the information will be conveyed to Emergency Management or First Responders via RVCOG SDS Chain of Command.

## **Food & Friends Senior Meals Program**

See full Food & Friends Plan in Appendix iii. Generally: The SDS Food & Friends Meals Program will close congregate sites when it is unsafe for participants to attend. Home Delivered Meals service will be maintained for vulnerable consumers if at all possible. The decision to close facilities will be made by the Food & Friends Program Managers in coordination with the RVCOG SDS Executive Director and the SDS Director depending on site location and local conditions. The plan will be communicated to the Contracted Kitchen Manager and Food & Friends staff as laid out in the program emergency phone tree. Emergency alternate plans will be communicated to meals recipients (dependent on the level of the emergency) by TV or radio stations, community chalkboards or PSA's. In extreme emergency situations Food & Friends will comply with and where requested, aid Jackson and Josephine Counties emergency plans first responders to determine the level of need for our most vulnerable and dependent clients. The determination will be made through the priority scoring available through our Meal Service client database. The Contractor is required to have a separate Disaster Plan in place to ensure the continued supply of meals for our clients.

Additionally:

- Congregate Meal Sites: each emergency is different and may affect the various meal sites in a different manner or in varying levels of severity as they are spread throughout a wide geographic area. The Meal Site will be closed as determined by the Food & Friends Program Managers. Each site will have on hand additional frozen meals to distribute to congregate clients in the event of forecasted adverse weather conditions.
- Home Delivered Meals: emergency frozen meals will be distributed to every Home Delivered Meals client three times between November and February. These frozen meals will be labeled (clearly visible) with instructions to save for use when the volunteers are unable to deliver. Sites will receive sufficient meals to supply clients who start service between November and February.

Beyond these plans for meals, SDS consumers will be served by the disaster assistance provided by local entities and nutrition service as coordinated with state, local and volunteer organizations.

### **Disaster Registry Activation**

The Disaster Registry is activated by RVCOG SDS staff as soon as a disaster is announced by Emergency Management. If the event is localized, SDS staff will implement contact procedures for individuals and facilities in the impacted area. If the event is an earthquake or other event that impacts all of Jackson and Josephine Counties, Disaster Registry phone volunteers will be contacted and requested to check in on everyone in their books.

The primary purpose of contacting registrants is to see if they are aware of the event and have assistance to shelter in place or to evacuate as instructed by emergency responders. If the individual or facility has been given orders to evacuate, but is unable to do so because they need assistance, the caller contacts the Disaster Registry Supervisor or designate who then notifies the appropriate County Emergency Manager.

### **RECOVERY PHASE**

RVCOG SDS will resume operations—in a phased in manner, if necessary—as dictated by the type and severity of damage to facilities and impact on community resources available.

### **APPENDICES**

- i. SDS RVCOG SDS Contact Information
  - a. SDS Management Staff
  - b. SDS Employees
- ii. APD Management Contact Information
- iii. Food & Friends Emergency Plan
  - a. Food & Friends Contact Information

## **Appendix F – List of Designated Focal Points**

### Senior Center Focal Points

- Ashland Senior Program
- Eagle Point Senior Center
- Rogue River Community Center

### Other Focal Points:

- Grants Pass Senior and Disability Services Field Office
- Josephine County Senior Resource Center
- Medford Senior Services Field Office



## Appendix G – Partner Memorandums of Understanding



Senior and Disability Services  
(541) 664-6674 • FAX (541) 664-7927 • [www.rvcog.org](http://www.rvcog.org)

### Memorandum of Understanding

Between the

The ADRC  
(of RVCOG Senior & Disability Services)  
And  
Jackson County

#### I. Purpose

The following Memorandum of Understanding is between the Aging and Disability Resource Connection of RVCOG SDS and Jackson County (JC).

The purpose for this Memorandum of Understanding (MOU) is to recognize the interconnected and complementary nature of the services provided by the Aging and Disability Resource Center (ADRC) and JC and to define the roles, responsibilities and procedures for collaboration between ADRC and JC.

The period of this agreement begins on July 1, 2013 and continues until amended or terminated.

#### II. Roles and Responsibilities

##### Referrals for Service

JC will strive to refer clients to the ADRC for services such as:

- Information and assistance where ADRC services can complement or augment those provided by JCMH and/or JCDD services;
- Disability and aging benefits counseling;
- Assistance in accessing publicly funded long term care;
- Care Transition services;
- Health Promotion programs for the aging/people with disabilities;
- Any other ADRC service that may benefit the consumer.

The ADRC will strive to refer clients to JC to:

- Determine if they have an existing DD or MH service coordinator.

- Determine eligibility for Developmental Disabilities or Mental Health services.
- Provide Options Counseling for people who are likely eligible for services from JCMH or JCDD Services as needed.

#### **Quality Assurance**

- JC will strive to ensure that intake staff providing Options Counseling will have appropriate Options Counseling training.
- JC will strive to ensure the client will have the same Options Counselor through the entire Options Counseling process.

#### **Information Sharing**

- The ADRC and JC will participate in the ADRC Steering Committee on a regular basis to provide information about their respective services and philosophies as well as problem-solving on ADRC operational issues.
- JC will assist in providing information regarding the opportunity for clients to join the ADRC Operations Council- a consumer driven Council that will provide input to the ADRC Steering Committee.
- JC and the ADRC will share information regarding other services, providers and resources to assist in maintaining and updating their respective resource databases.
- JC and the ADRC will provide each other with information regarding unmet needs of people with mental illness and/or Developmental Disabilities who are aging or with disabilities.
- The ADRC and JC will share information about staff and consumer training opportunities, as well as participate in cross-training opportunities when resources allow.

#### **Nonbinding**

- This MOU creates no right, benefit, or trust responsibility, substantive or procedural, enforceable at law or equity by either party or by any third party. The parties shall manage their respective resources and activities in a separate manner to meet the purposes of this MOU. Nothing in this MOU authorizes any of the parties to obligate or transfer funds. Specific projects or activities that involve the transfer of funds, services, or property among the parties require execution of separate agreements and are contingent upon the availability of appropriated funds. These activities must be independently authorized by statute. This MOU does not provide that authority. Negotiation, execution, and administration of these agreements must comply with all applicable law. Nothing in this MOU is intended to alter, limit, or expand the agencies' statutory and regulatory authority.

This MOU is effective upon signature by both parties and shall terminate upon the notice by one party to the either party. This MOU may be revised upon the mutual concurrence of both parties.



Senior and Disability Services  
(541) 664-6674 • FAX (541) 664-7927 • [www.rvcog.org](http://www.rvcog.org)

## **Memorandum of Agreement**

Between the

The ADRC  
(of RVCOG Senior & Disability Services)  
And  
Options for Southern Oregon

### **I. Purpose**

The following is an agreement between the Aging and Disability Resource Connection of RVCOG SDS and Options for Southern Oregon (Options).

The purpose for this Memorandum of Agreement (MOA) is to recognize the interconnected and complementary nature of the services provided by the Aging and Disability Resource Center (ADRC) and Options and to define the roles, responsibilities and procedures for collaboration between ADRC and Options.

The period of this agreement begins on July 1, 2013 and continues until amended or terminated.

### **Roles and Responsibilities**

#### **Referrals for Service**

Options will refer clients to the ADRC for services such as:

- Information and assistance where ADRC services can complement or augment those provided by Options;
- Disability and aging benefits counseling;
- Assistance in accessing publicly funded long term care;
- Care Transition services;
- Health Promotion programs for the aging/people with disabilities;
- Any other ADRC service that may benefit the consumer.

The ADRC will refer clients to Options for service such as:

- Clients that may be eligible for mental health services, Options Counseling (OC) for people who are currently receiving services from Options or are likely to be eligible for such services.
- Information and assistance where mental health services can complement or augment those provided by ADRC;
- Care Transition services where appropriate for mental health.

**Quality Assurance**

- Options staff providing Options Counseling will have appropriate Options Counseling training.
- Options staff trained in Options Counseling will provide services that meets ADRC Options Counseling standards
- When appropriate, Options will strive to ensure the client will have the same Options Counselor through the entire Options Counseling process

**Information Sharing**

- The ADRC and Options will participate in the ADRC Steering Committee on a regular basis to provide information about their respective services and philosophies as well as problem-solving on ADRC operational issues.
- Options will assist in recruitment of clients to join the ADRC Operations Council- a consumer driven Council that will provide input to the ADRC Steering Committee.
- Options and the ADRC will share information regarding other services, providers and resources to assist in maintaining and updating their respective resource databases.
- Options and the ADRC will provide each other with information regarding unmet needs of people with mental illness who are aging or with disabilities.
- The ADRC and Options will share information about staff and consumer training opportunities, as well as participate in cross-training opportunities when resources allow.

This agreement is effective until terminated by either party and may be revised upon the mutual concurrence of both parties.

  
 \_\_\_\_\_  
 Dave Toler, Director RVCOC SDS ADRC

6/3/13  
 Date

  
 \_\_\_\_\_  
 Shelly Uhrig, COO Options for Southern Oregon

6/3/13  
 Date

## MEMORANDUM OF UNDERSTANDING FOR Rogue Valley Council of Governments (RVCOG)

This Memorandum of Understanding ("MOU" or "Agreement") is entered into effective as of 11/15/2019 by and among Rogue Valley Council of Governments (RVCOG) hereinafter referred to as "Partnering Agency", and La Clinica del Valle Family Health Care Center, Inc., hereinafter referred to as "La Clinica".

### RECITALS

This Memorandum of Understanding is for licensure and administrative support to offer Living Well programs at La Clinica sites. By this MOU, the parties seek to clarify their respective rights and obligations with respect to the operation of the program.

In consideration of the mutual covenants set forth herein, the parties agree as follows:

### SECTION 1. SUPPORT AND SERVICES

#### 1.1. La Clinica

La Clinica shall:

- a. Offer and promote Living Well programs for patients and community members.
- b. Deliver services to patients and allow 4-8 community members at least one per year per type of class to keep certification.
- c. Manage and coordinate Spanish referrals.
- d. Arrange food preparations at each session.
- e. Provide appropriate space for classes.
- f. Maintain appropriate health records for patients consistent with applicable federal and state laws and regulations.
- g. Responsible for partial staff training cost.

#### 1.2 Rogue Valley Council of Governments

RVCOG shall:

- a. Promote and offer training to La Clinica staff at a discounted rate or no cost.
- b. Coordinate English referrals and keep current certifications.
- c. Design and cover cost of the flyers.
- d. Provide class materials, food costs, forms and books for participants.
- e. Provide data collection, analysis and report.
- f. Bill Coordinated Care Organizations (CCO's) and insurance for reimbursement.

**SECTION 2. TERM AND TERMINATION**

**2.1 Term:**

This MOU shall be effective as of 11/15/2019, and shall continue until 11/15/2022, unless earlier terminated in accordance with SECTION 2.2.

**2.2 Termination:**

- a. **Mutual Consent.** This Agreement may be terminated at any time by the mutual consent of both parties by giving the other party at least 120 days prior written notice of such termination.
- b. **La Clinica's Convenience.** This Agreement may be terminated at any time by La Clinica upon thirty (30) days' notice in writing and delivered by certified mail or in person.
- c. **For Cause.** La Clinica may terminate or modify this Agreement, in whole or in part, effective upon the delivery of written notice to Partnering Agency, or at such later date as may be established by La Clinica, under any of the following conditions:
  - i. If La Clinica's funding from the grant sources is not obtained or continued at levels sufficient to allow for the purchase of the indicated quantity of services;
  - ii. If the grant regulations or guidelines are modified, changed, or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this Agreement, or are no longer eligible for the funding proposed for payments authorized by this Agreement; or,
  - iii. If any license or certificate required by law or regulation to be held by Contractor to provide the services required by this Agreement is for any reason denied, revoked, suspended, or not renewed.
- d. **For Default or Breach.** Either La Clinica or Partnering Agency may terminate this Agreement in the event of a breach of Agreement by the other party. Prior to such termination the party seeking termination shall give to the other party written notice of the breach and intent to terminate. If the party committing the breach has not entirely cured the breach within fifteen (15) days of the date of the notice, or within such other period as the party giving the notice may authorize or require, then the Agreement may be terminated at any time thereafter by a written notice of termination by the party giving notice. Time is of the essence for the Partnering Agency's performance of each and every obligation and duty under this Agreement.

**SECTION 3. RELATIONSHIP OF PARTIES**

This Agreement shall not be construed to create a partnership, joint venture or an employer-employee relationship between the parties, or their agents and employees.

**SECTION 4. COMPENSATION**

Neither party in this Agreement will receive compensation from the other party as part of this Agreement.

**SECTION 5. COMPLIANCE BY LAW**

Each party shall be responsible, in connection with the services that party is providing under this MOU to (a) comply with all applicable federal, state and local laws and regulations with respect to the performance of such Party's respective services; (b) file all required reports relating to the services such Party is providing (including, without limitation, federal, state and local tax returns); (c) pay all applicable filing fees, federal, state and local taxes applicable to such parties business as the same shall become due and payable; and (d) pay all amounts required under local, state and federal workers' compensation acts, disability benefit laws, unemployment insurance laws, and other employee benefit laws when due for such party's employees who are participating in the provision of services to La Clinica under this Agreement.

**SECTION 6. INSURANCE; RISK OF LOSS**

Each party to this MOU shall maintain general liability insurance coverage in sufficient amounts to protect against all foreseeable risks that are related to the services and support provided by such party under this Agreement. La Clinica shall carry a minimum of \$1,000,000 combined single limit general and professional liability insurance coverage at all times during the term of this MOU covering the services and support provided by La Clinica pursuant to this MOU. La Clinica shall also, at a minimum, carry \$500,000 in property damage insurance coverage and shall name Partnering Agency as an additional insured in said policy. Each party shall provide appropriate evidence of such insurance coverage as may be reasonably requested by each party to evidence such other party's continuing compliance with these insurance requirements.

Notwithstanding these insurance requirements, each party shall be legally responsible for its own acts or omissions in the provision of services under this Agreement, and each party shall indemnify, defend and hold the other party harmless from and against any claims, liabilities or actions as a result of the active negligent or wrongful conduct of such party, including their agents and employees, under this Agreement.

**SECTION 7. EMPLOYEE SUPERVISION**

La Clinica shall appropriately investigate and screen (i.e. criminal background checks, fingerprinting, etc.) all non-professional employees who provide services under this MOU. La Clinica shall also provide appropriate supervision of its employees and agents providing services in accordance with La Clinica human resource policies and procedures. La Clinica shall further ensure that its employees and agents

shall at all times comply with Partnering Agency's policies, procedures and protocols. All incidents of alleged misconduct by a La Clinica employee or agent while providing services under this MOU shall be reported immediately to Partnering Agency. Partnering Agency reserves the right to deny any La Clinica agent or employee from performing services under this Agreement on Partnering Agency property.

**SECTION 8. CONFIDENTIALITY OF PATIENT RECORDS**

8.1 The Parties (and their directors, officers, employees, agents, and contractors) shall maintain the privacy and confidentiality of all information regarding the personal facts and circumstances of the La Clinica patients, in accordance with all applicable federal and state laws and regulations (including, but not limited to, the Health Insurance Portability and Accountability Act and its implementing regulations set forth at 45 C.F.R. Part 160 and Part 164) and La Clinica's policies and procedures regarding the privacy and confidentiality of such information. The Parties (and their directors, officers, employees, agents, and contractors) shall: (1) not use or disclose patient information, other than as permitted or required by this Agreement for the proper performance of its duties and responsibilities hereunder; (2) use appropriate safeguards to prevent use or disclosure of patient information, other than as provided for under this Agreement; and (3) notify the other immediately in the event the Party becomes aware of any use or disclosure of patient information that violates the terms and conditions of this Agreement or applicable federal and state laws or regulations.

8.2 It is further understood and agreed that all reasonable efforts will be taken to obtain parental or student consent prior to disclosure of confidential information to Partnering Agency's designated personnel, which shall only occur to better coordinate services to enhance a student's learning and success in Living Well programs.

8.3 In situations involving suspected abuse or neglect, La Clinica staff will promptly make a report to the Oregon Department of Human Services and notify designated Partner Agency's representatives that a report has been made. La Clinica staff will ensure completion of proper documentation.

**SECTION 9. GOVERNING LAW; JURISDICTION; VENUE**

This MOU shall be governed and construed in accordance with the laws of the State of Oregon without resort to any jurisdiction's conflict of laws, rules or doctrines. Any claim, action, suit, or proceeding between La Clinica and the Partnering Agency that arises from or relates to this Agreement shall be brought and conducted solely with in the Circuit Court of Jackson County for the State of Oregon. Provided, however, if the claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon filed in Jackson County, Oregon. Partnering Agency, by the signature herein of its authorized representative, hereby consents to the in *personam jurisdiction* of said courts.



**SECTION 10. GENERAL CONDITIONS**

**10.1 Force Majeure:** Neither La Clinica nor Partner Agency shall be held responsible for any delay nor default caused by fire, riot, acts of God, or war where such cause was beyond, respectively, La Clinica or Partner Agency's reasonable control. Partner Agency shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon cessation of the cause, diligently pursue performance of its obligations under this Agreement.

**10.2 Severability:** The parties agree that if any term or provision of this Agreement is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Agreement did not contain the particular term or provision held to be invalid.

**10.3 Survival:** The terms, conditions, representations, and all warranties contained in this Agreement shall survive the termination or expiration of this Agreement.

**10.4 Waiver:** The failure of La Clinica to enforce any provision of this Agreement shall not constitute a waiver by La Clinica of that or any other provision.

**10.5 Execution and Counterparts:** This Agreement may be exercised in several counterparts, each of which shall be an original, all of which shall constitute but one and the same instrument.

**10.6 Notice:** Notices required by this Agreement must be given in writing or by personal delivery or mail, at the following addresses, unless some other means or method of notice is required by law. Each party will notify the other of any change of address.

Rogue Valley Council of Governments  
POB 3275  
155 N. 1<sup>st</sup> St.  
Central Point, OR 97502

La Clinica del Valle Family Health Care Center, Inc.  
931 Chevy Lane  
Medford, OR 97504

**10.7 Merger Clause:** This Agreement and the attached exhibits constitute the entire agreement between the parties. No waiver, consent, modification or change of terms of this Agreement shall bind either party unless in writing and signed by both parties. Such waiver, consent, modification, or change, if made, shall be effective only in the specific instance and for the specific purpose given. There are no understandings, agreements, or representations, oral or written, not specified

herein regarding this Agreement. Partner Agency, by signature of its authorized representative, hereby acknowledges that (s) he has read this Agreement, understands it, and agrees to be bound by its terms and conditions.

**SECTION 11. ASSIGNMENT**

Neither party may assign this MOU, in whole or in part, without each of the other party's prior written consent.


**SECTION 12. ENTIRE AGREEMENT, INTERPRETATION AND CHANGES**

This MOU constitutes the entire agreement between the parties with respect to the subject matter described herein, and all prior and contemporaneous oral or written communications, understandings or agreements between the parties with respect to the subject matter herein are hereby superseded in their entirety. Any changes, amendments, or modifications to this Agreement shall not be binding on the parties unless mutually agreed to by the parties in writing.


**SECTION 13. DISPUTE RESOLUTION**

The parties shall attempt to use reasonable efforts to resolve any disputes through good faith negotiations and, where appropriate, use alternative dispute resolution as may be agreed by the parties, including mediation and/or arbitration.

The parties have executed this Memorandum of Understanding on the dates first noted below:

  
Michael Cavallaro  
Executive Director  
Rogue Valley Council of Governments (RVCOG)

12/16/19  
Date

DocuSigned by:  
  
Michelle Wilson  
Wellness Program Manager  
La Clinica del Valle Family Health Care Center, Inc.

12/17/2019  
Date

## **Appendix H – Needs Assessments**

Rogue Valley Council of Governments  
Senior and Disability Services  
**2019-2020 Senior Needs Survey**

### **Purpose and Methods**

The Jackson and Josephine Counties' governmental agency on aging conducted a survey of seniors and individuals with disabilities in their counties in 2019-2020. The purpose of the survey was to better understand what services seniors need to ensure that those facing aging or disability issues, or those caring for persons with such issues, are able to live as independently as possible.

A total of 745 survey forms were completed, of which 616 contained usable data. The respondents completed the survey by either filling the forms by pencil or pen, or entering responses into the survey form on the SurveyMonkey website. The survey period was October 2019 to May 2020. The estimated time to complete each survey form was 10 minutes. The respondents were identified through events/activities where seniors congregate, such as congregate meal sites, AARP Vital Aging Conference, Providence Resource Fair, Grants Pass Senior Resource Fair, Three Rivers Resource Fair, Twin Creeks Senior Resources Fair, and area senior centers. Announcements were made at regularly attended meetings including: APD Managers, APD/AAA Team Enhancement Committee, RVCOG SDS All Staff, Latinix Interagency Networking Committee, Homeless Task Force, Human Service Consortium, United Way Directors, Unete, and SOHealthy. COVID-19 stopped plans to participate in the ACCESS Senior Fair and the Illinois Valley Health Fair. Senior Advisory Council members and staff assisted in getting the word out to churches, service clubs, and their own social networks. Notices with links to the survey were sent to SDS email distribution lists including OAA and OPI subcontractors and Older Adult Behavioral Health Specialist (OABHS) social services agencies list-serve. Surveys were distributed to home-delivered meals participants. An article was run in the regional AARP publication. The respondents constituted a convenience sample.

The data were collected to describe the demographic characteristics of the respondents, their current living conditions, condition of their health, sources of health information and support, and needs for assistance and services. In addition

to examining the percent distribution of the variables among all, they were grouped by age into three categories, 59 years and younger, 60-79 years and 80 years and older, and by gender. The distribution or number of responses in the other demographic characteristics was insufficient to conduct further analysis.

The analysis in this report is a cursory view of the survey data that was conducted using one-way and two-way frequency tables. Multivariate analysis and statistical testing for significance was not attempted on the survey data collected from a convenience sample.

**Demographic Characteristics of Respondents**

The majority of the respondents were female (73.5%) and white (92%). Only 4% said they were Hispanic and 6% identified themselves as LGBT. The percent of respondents in the three age categories were 59 years or younger (21%), 60-79 years (51%) and 80 years or older (28%). Almost three-quarters (72%) of the respondents were female (Table 1). Jackson County residents made up 64% of the respondents.

Table 1. Percentage gender by age category

Gender	<59 years	60-79 years	>80 years	All (%)
Female	31	274	108	73
Male	12	100	39	27
All	43	374	147	100

**Household Living and Transportation Arrangement**

Most of the respondents currently live in their own home or apartment (69%) or rent a house or apartment (17%). A few lived with their family or friends (6%) and some were homeless (1%)

When asked if they are living in a home with someone else, 42% said they lived with a spouse or significant other and almost 14% said there were children or grandchildren living with them. Companionship was the most common reason for living with someone else (32%), but their own or the other’s financial needs were important (36%) as were health needs (32%).

Over three fourths (77%) said they do not receive assistance with transportation. Of those that did, 59% said they relied on family and 36% relied on friends. Almost half (46%) of them also used some kind of public or volunteer transportation. Most reported that they did not miss activities because of transportation issues (61%) but 8% said they frequently missed activities because of it.

### **Sources of Information and Assistance**

Where do seniors get information about needed services? The most common sources were family, friends and neighbors (63%), computer/internet (62%) and the media such as newspaper and TV (37%). A few (9%) said they didn't know who to ask. Of the 20% of the respondents who said they used the Aging and Disability Resource Connection (ADRC), 58% said it was extremely or very helpful, and the remaining 6% said moderately or slightly helpful and 1% reported it was not helpful at all. **A vast majority of respondents (80%) had not used ADRC at all.**

### **Health**

When asked to rate their physical health, 18% said excellent, 47% said good and the remaining 25% said fair or poor. Most had an advanced directive (67%), but 27% said they didn't and 6% said they didn't know. **The health services that the respondents felt they need but are not accessing were dentist (40%), eye care (18%), and alternative health (25%).** Most were able to access physical therapy (77%) and mental health (78%) with a doctor being the most accessible (91%). Governmental assistance plans such as Medicare or **Medicaid are readily available to most, but 21% said they could not go to a health care provider because they did not accept these plans.**

Most (86%) of the respondents said they have an annual physical checkup. They received health screening procedures for high or low blood pressure (82%), heart disease (53%), diabetes (49%), and colon/rectal cancer (44%). Half (49%) of the men were screened for prostate cancer and 52% of the women had mammograms. Most (85%) were aware that Medicare covered health screening and vaccinations.

### Family Care Provider

When asked if they provide care to an elder or adult with disabilities, 21% said they did. They were most often a spouse or significant other (38%) or a parent (22%). About 15% said they cared for either a child, friend, or a neighbor. Unrelated to family caregiving, almost half of the respondents (45%) said they receive help with tasks from family or friends and 77% said they receive enough help.

### Well Being

Are the respondents lonely? Over half (55%) said no, but 9% said yes, and 25% said sometimes. How secure about finances, health, dependency, loneliness, and crime do the respondents feel? (Table 2). Most (78%) of the respondents felt they would have enough to eat, while fewer felt they would not be lonely and without friends (52%), will not have to leave their home (38%), have enough to live on (50%), and not be a victim of a crime (44%). **Loss of memory (25%) and dependency on others (27%) was where respondents felt the most insecure.**

Table 2. Percent who felt secure and levels of insecurity

	Secure	Insecure		
		Little	Somewhat	Very
Enough to live on	50	24	13	13
Good health	28	38	21	14
Enough to eat	78	12	7	3
Not depend on others	27	36	18	19
Not leave home	38	32	16	13
Not be lonely	52	25	13	10
Not victim of crime	45	36	13	7
Not lose memory	25	42	22	12

## Housing

Among all respondents, 63 of them (12%) said they recently had trouble finding affordable rental housing. About 60% of the respondents who said they had trouble finding affordable housing said they are on a list for senior or Section 8 housing. Only 6% of the respondents knew about the Lifelong Housing Certification Program.

Among those who indicated that they own their home, they were asked about the cost of maintenance and needs for repairs and modification. **Over a third (39%) said their residences need significant repairs or modifications.** The modifications needed and plans to change are shown in Table 3. A little less than half said they are planning to change bathrooms and more than half, make structural changes with fewer saying they plan to change the remaining. **When asked why they are not planning to make changes, over half (30%) said they could not afford to make these changes.**

Table 3. Kinds of modifications needed and plans to change by percent of respondents

	No	Yes	Plans to Change		
			No	Yes	NA
a. Cooling	76	24	47	16	36
b. Heating	73	27	46	18	36
c. Weatherization	66	34	54	14	32
d. Access	54	46	57	20	23
e. Kitchen appliances	85	15	42	11	47
f. Bathroom	46	54	43	43	14
g. Pests	67	33	35	28	36
h. Structural-roof/plumbing	58	42	46	27	27

## Disaster Registry

Most of the respondents (88%) said a family member or friend would help them during an emergency and **34% said they would need help evacuating during an emergency or natural disaster**. About one quarter (24%) said they know about the Disaster Registry but only 5% are listed. Among all respondents, **40% said they want more information so they could be listed**.

## Services Available in the Rogue Valley

The respondents were asked if they were aware of certain services available in the Rogue Valley. The percent of respondents who answered “I am aware of” and “Have Used” are shown in Table 4.

Table 4. Knowledge and use of services in the Rogue Valley by percent of respondents

Available Services	% aware of	% used
Adult Protective Services	97	6
Care Settings	96	7
Caregiver Training and Support	95	11
Chronic Disease/Pain/Diabetes Self Management	90	17
Driver Safety Training	93	13
Financial Assistance	92	13
Guardianship/Conservancy	95	7
Heating and Utility Assistance	91	17
Home Care/Personal Care	93	14
Home-Delivered Meals/Senior Meal Sites	92	14
Housing assistance	94	9



Legal Assistance	95	8
Medical Supplies	93	12
Medicare Information	92	17
Mental Health Services	94	8
SNAP (food stamps)	85	25
Support Groups (i.e. Alzheimer's, Grief)	95	10
Tax Preparation Assistance	90	15
Transportation	93	14

In the final question, the respondents were asked to list other services they wish were available in the two counties. They are listed at the end of this report.

### **The effect of gender and age on the findings**

Age and gender are often thought to play a role in the needs of seniors for services and their ability to access them. Each of the variables in this survey was examined to determine if the respondents in this survey experienced any difference in need or access because of their gender or age.

The responses of male and female respondents were similar to most questions with a few exceptions. More males (59%) said they were not able to access dental care than females (46%). Males were more likely to have certain health screening procedures than females, that is, 62% of males had heart disease screening compared to 49% of females, 89% of the males had blood pressure screening compared to 79% of females, and 44% of the males and 51% of females were screened for diabetes. When asked about loneliness, 66% of males said they were not lonely, compared to 52% of females. Males (51%) were more likely to be providing care to a spouse than females (32%). Slightly more females (32%) reported that they did not have enough help with tasks compared to males (25%). When asked about their sense of security relative to housing, health, enough to eat, dependency, loneliness, being a victim of a crime and memory loss, males

were consistently more secure than females, although the percentages were not vastly different. Slightly more of the females (36%) said they will need assistance evacuating their home during an emergency or natural disaster than males (30%).

Age appeared to be more important than gender in needs for assistance and support. The respondents who were 59 years or younger will be referred to the younger, the 60 to 79 years old will be called the middle, and the 80 year olds and older as older. About two thirds of all groups lived in their own homes. Few of the respondents lived in residential care facilities and if they did, they were most likely in the older group (4%). The older group by far (30%) compared to 16% and 19% for the younger and middle groups respectively received assistance with transportation. The main sources for information used by age groups show that all use family and friends the most, however, the older and middle groups used them more, 64% compared to the younger, 50%. **The Aging and Disability Resource Connect (ADRC) had not been used by 70% of the younger, 79% of the middle and 88% of the older respondents.** 46% of the respondents in the older group used the internet as a resource while 85% of the younger group did. One quarter (26%) of the younger group reported that they were in excellent health compared to almost a fifth of the middle group and 12% of the older. The younger group almost always was less able to access certain care, the exception being dental care (Table 5).

Table 5. Percent NOT able to access needed health services

Services	Age Category		
	59 or less	60-79 years	80 or more
Alternative Health	30	39	10
Dentist	52	37	34
Doctor	15	9	4
Eye Care Provider	22	19	10
Mental Health	48	21	22

PT or OT	37	22	20
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The younger group was more likely than the other groups to have a mammogram (57%) and mental health screening (32%). The middle group were more likely to have colon/rectal (54%), diabetes (53%) and prostate (17%) examinations or procedures. The percent of the older group who had these examinations or procedure tended to be considerably lower. Among the younger group of respondents who provided care, 63% provided care to a parent. A spouse or significant other was the person receiving care by the middle and older respondents, 38% and 56%, respectively. When asked, “Are you lonely?”, 12% of the younger group said “yes”, while 7% of the middle and 8% of the older said “yes”.

How secure do these age groups feel about certain life and financial situations? **A smaller percentage of the younger age group felt secure in all situations compared to the other age groups (Table 6).** There was a striking and consistent contrast in the feeling of security between the age groups. As the groups got older, the more secure they felt.

Table 6. Percent who felt secure and levels of insecurity by age groups

	Secure			Insecure								
	Y	M	O	Little			Somewhat			Very		
Y				M	O	Y	M	O	Y	M	O	
Enough to live on	33	50	56	30	25	24	27	12	15	30	14	5
Good health	16	29	29	37	33	42	37	21	22	28	15	8
Enough to eat	63	78	86	9	12	10	20	8	3	9	3	.6

Not depend on others	19	25	34	21	38	34	21	18	17	40	19	15
Not leave home	26	38	41	33	33	31	14	14	21	23	16	7
Not be lonely	37	51	59	16	26	25	22	13	11	16	11	5
Not victim of crime	36	43	48	16	36	36	24	13	11	14	8	4
Not lose memory	17	23	29	14	41	40	28	24	21	24	12	10

Y=<59 years, M=60-79 years, O=>80 years

**Affordable housing was a problem for 40% of the younger group and 35% of the middle and 10% of the older.** Among those looking for housing, 22% of the older and 6% of the middle were waiting for senior housing. Almost three quarters of the younger group was waiting for Section 8 housing, while 16% of the middle and 22% of the older were. **Over half of the younger group said their residences need significant repairs, modifications or changes.** Fewer of the middle (42%) and older (29%) said such repairs were needed. **Not able to afford the repairs was the most common reason for not making the repairs with more of the younger group (65%) saying it was the reason than the middle group(32%).** The older group was split on the reason that they did not make repairs between being unable to afford it (22%) and not being able to make the repairs themselves (19%).

Around 80% of all respondents said they had a relative or friend who would help them during an emergency. Almost half of the younger group said they would need assistance, fewer (29%) of the middle group did, but almost half (44%) of the older group did.

In Jackson and Josephine Counties, the awareness of the availability of services among all age groups was remarkably similar, with one exception. Around 90% of all age groups were aware of home delivered or senior meal sites.

However, 11% of the younger and middle groups have used the service, but 19% of the older did.

## **List of Other Services Needed from 2019 2020 Senior Needs Assessment Survey**

### **In-Home Services**

- Help to bathe
- Help to stay in the home
- Help with shopping
- Home delivery of groceries
- Housekeeping care in home
- Housekeeping/maid services for the elderly handicapped
- More respite service hours for caregivers
- Occasional In home care
- On-call caregiver in case mine cannot come
- Since I'm confined to a wheelchair I order everything online, but have problem with help

### **Housing**

- Ability to match roommates in rentals.
- Emergency housing
- Full rental assistance
- HUD for rent assistance
- I am on the senior housing list for senior housing - not sure how long
- More housing for homeless seniors
- More low-income rental facilities

### **Loneliness**

- Elder visitation - just someone to stop by once in a while to keep me company. I have no family/friends

### **Transportation**

- 24 hours bus services
- Affordable transportation to live entertainment
- Autonomous transportation not tied to when bus schedule cuts off at night
- Better access to public transportation in rural areas, not just to and from urbanized areas along main highways

- Better bus service for Mountain Meadows area
- Better individual transportation
- Better transportation for grocery, shopping and medical appointments
- Bus in the rural areas
- Bus or taxi services
- Bus or Valley Lift run on weekends and holidays, some of the best events happen on those times and I cant go
- Easily accessible bus transport/bus used to stop near our house but no longer available
- Evening and weekend RVTD bus service
- Extended bus route in Grants Pass
- Free transportation for elderly and disabled
- Free transportation to dr appts
- Less expensive medical transportation
- Low cost transportation to grocery store or free delivery
- More rides for grocery shopping
- More transportation for uninsured clients
- More transportation options for those unable to ride bus (and don't qualify for valley transit)
- More transportation options for those who no longer drive
- Non-medical transportation
- Personal helpers when I need help or transportation such as getting my cats to the vet or pick up or delivery services such as UPS or postal services or banking. I use a walker and no longer drive.
- RVTD service on N Mountain in Ashland
- The bus stop closer to my house
- Transportation
- Transportation for those who use portable oxygen
- Transportation if unable to drive, does not drive at night, in Jerome Prairie Area
- Transportation to and from Jump Off Joe Creek Rd
- Transportation to medical
- Transportation to medical appointments. I can't afford it.
- Transportation to Portland and San Francisco by rail and not via Klamath Falls at 3 a.m.

### **Maintenance/Repair/Chore Services**

- Handyman services
- Help with major home repair expenses for those on limited incomes
- Lane County has a Fix-it Fair twice per year. Volunteers fix toasters, help with sewing etc.
- Reasonable yard maintenance
- Yard work/ Home Maintenance - affordable help
- Yardcare

### **Medical/Dental/Vision**

- Affordable dentures
- Denture services
- Help obtaining expensive medications
- Medical cost aid for the Donut Hole between Medicare and actual cost for doctors and lab
- More medical information

### **Legal/Financial/Government Programs**

- A higher threshold of income for accessing services or ability of agencies to take into account
- Answers to simple or non-complex legal questions such as doing your own simple will
- Assistance for senior homeowners when the property is hit by vandals
- Assistance with will
- Complete veteran medical service in Grants Pass
- Comprehensive place to obtain legal and medical advise and assurance in filling out
- Counseling for divorced woman with children
- Do not understand why reduction of my food allowance to near starvation levels
- Government deleted my food stamps
- Help with American Indian money
- Help with qualification for SSI
- Less restraint on income for food stamps in the senior population
- Make my Food & Friends meal last for two meals
- Need help with housing and negotiating the bureaucracy of social services. I'm exhausted and overwhelmed by the challenges ill health has presented,

so I'm not energetic enough to put up with making calls being referred elsewhere after being on hold and or after having been referred to three times before

- Power of Attorney
- Senior portfolio protection, i.e., someone who regulates brokers who diminish a senior's income
- Wish it was more easy to get VA help

## Other

- Access to more activities to keep a body moving. Monetarily is the biggest issue
- Assisted Living options in the Illinois Valley
- Club houses or meeting places where we can meet, gather and support each other
- Dairy-free meals
- I need to educate myself so I can be a better caregiver to my mom.
- Im not aware of them. I'm often confused
- Josephine County needs adequate law enforcement, Sheriffs
- LGBTQ housing
- LGBTQ safe service
- Medicare for people caring for spouse with disabilities
- Mental health activities
- Mental health doctors in Ashland (not students in training)
- More caregiver support groups for spouses with chronic pain, disability, or a general one
- More companion care for folks with early to moderate Alzheimer's
- More free social services
- More places where our homeless people can take showers and do laundry more often
- Music option for disabled folks that love to sing and or play piano
- Paid indigent bill paying and periodic reports to Social Security, Medicare, Medicaid and VA
- People who would give me a second chance. Senior Services say, "no funds – go find a place"
- Post-Traumatic Stress Disorder support group
- Probably won't be able to stay in home because of the ridiculous property taxes in this state



- Senior Center
- Senior rates for Club Northwest. I would use their warm pool, but can't afford cost.
- Senior social groups
- Services directed toward the chemically sensitive
- Something for people like my neighbor, who does not want to move, but needs to
- Wellness checks

### **Summary and Recommendations**

Between October 2019 and March 2020, the Senior and Disability Services of the Rogue Valley Council of Governments conducted a Senior Needs Survey resulting in 616 usable responses. The surveys were completed by individuals attending or participating in events where seniors gathered in Jackson and Josephine Counties. The majority of the respondents were female (73.5%) and white (92%). They were categorized into three age groups, 59 years or less (7%), between 60 and 79 years (66%) and 80 years or more (26%).

Analysis of the data comparing responses by gender or age group showed that gender did not appear to be an important factor in determining living conditions or needs, whereas age did, sometimes in unpredictable ways.

Almost all of the respondents either lived in their own home or rented a home or apartment. Affordable housing was a problem for about a tenth of the respondents and several were waiting for Senior or Section 8 housing. Over a third of those who were in homes or apartments reported that major repairs or modifications to their homes were needed with over half of them saying they could not afford to make the changes. The need for the repairs was unexpectedly more commonly reported among the younger age group. Three quarters of the respondents did not need assistance with transportation, but when they did, they depended on family or friends. Most also relied on family or friends for information about available services but computers and internet were very commonly used among the younger and middle groups but far less among the older group. About a fifth of the respondents said they used ADRC for information.

Over half of the respondents said their health was either excellent or good but it was less so among the youngest group. The lack of accessibility of dental care was the most common health services problem among all age groups.

Questions about feelings of security relative to specific living or health conditions yield unexpected results. The youngest age group without exception was the most insecure in all of the situations presented in the survey, and the oldest age group was the most secure.

A vast majority of the respondents was aware of the services offered in the two counties, however, a large number of the oldest group were not aware of the senior meals program. The survey provided valuable information on the current status of senior health and living needs and their awareness of services available in the two counties. Because almost all of the respondents were white, the survey is not able to reflect the needs of other racial groups, such as the Hispanics who made up 6-7% of the two counties' population in the 2010 census and is growing. A survey targeting this racial group, who may be difficult to access, might be useful.

The feelings of insecurity among the younger group and their reporting a level of health that was less than the other groups indicates that there is a similarity in that group that was not captured in the survey. It is possible that these respondents were those who are severely disabled.

The following is a high-level list of needs (not prioritized) identified:

- Address loneliness
- Assist seniors to move through legal, financial and government program challenges
- Encourage all health care providers to accept Medicare
- Focus on addressing fear of memory loss and dependency on others
- Increase access to dental, eye and alternative health care
- Increase awareness of Disaster Registry
- Increase community awareness of Aging and Disability Resource Connection (ADRC)
- Provide affordable, accessible housing

- Provide help to make home repairs and/or modifications
- Provide in-home services
- Research and plan for people approaching turning 60 who are not prepared for aging
- Strengthen public and private transportation system

## Appendix I – Statement of Assurances and Verification of Intent

### Appendix I - Statement of Assurances and Verification of Intent

For the period of January 1, 2017 through December 31, 2020, Rogue Valley Council of Governments (RVCOG) – District 8 Area Agency on Aging accepts the responsibility to administer this Area Plan in accordance with all requirements of the Older Americans Act (OAA) (P.L. 109-365) and related state law and policy. Through the Area Plan, RVCOG shall promote the development of a comprehensive and coordinated system of services to meet the needs of older individuals and individuals with disabilities and serve as the advocacy and focal point for these groups in the Planning and Service Area. RVCOG assures that it will:

- Comply with all applicable state and federal laws, regulations, policies and contract requirements relating to activities carried out under the Area Plan.
- Conduct outreach, provide services in a comprehensive and coordinated system, and establish goals and objectives with emphasis on: a) older individuals who have the greatest social and economic need, with particular attention to low income minority individuals and older individuals residing in rural areas; b) older individuals with significant disabilities; c) older individuals at risk for institutional placement; d) older Native Americans; and e) older individuals with limited English proficiency.

All agreements with providers of OAA services shall require the provider to specify how it intends to satisfy the service needs of low-income minority individuals and older individuals residing in rural areas and meet specific objectives established by RVCOG for providing services to low income minority individuals and older individuals residing in rural areas within the Planning and Service Area.

Provide assurances that the RVCOG will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with significant disabilities, with agencies that develop or provide services for individuals with disabilities.

Provide information and assurances concerning services to older individuals who are Native Americans, including:

- A. Information concerning whether there is a significant population of older Native Americans in the planning and service area, and if so, an assurance that the Area Agency on Aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under the Area Plan;
- B. An assurance that the Area Agency on Aging will, to the maximum extent practicable, coordinate the services the agency provides with services provided under Title VI of the Older Americans Act; and
- C. An assurance that the Area Agency on Aging will make services under the Area Plan available; to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans.

Provide assurances that the Area Agency on Aging, in funding the State Long Term Care Ombudsman program under section 307(a)(9), will expend not less than the total amount of Title III funds expended by the agency in Fiscal Year 2000 on the State Long Term Care Ombudsman Program.

Obtain input from the public and approval from the Area Agency on Aging Advisory Council on the development, implementation and administration of the Area Plan through a public process, which should

include, at a minimum, a public hearing prior to submission of the Area Plan to DHS. RVCOG shall publicize the hearing(s) through legal notice, mailings, advertisements in newspapers, and other methods determined by the Area Agency on Aging to be most effective in informing the public, service providers, advocacy groups, etc.

1/6/17  
Date

*Laura O'Byon*  
Director, Senior and Disability Services

1/06/17  
Date

*Sandra L. Theis*  
Advisory Council Chair

1/06/17  
Date

*[Signature]*  
Executive Director  
Rogue Valley Council of Governments