

Notice of Instruction

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West Central Florida
Area Agency on Aging, Inc.



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Notice of Instruction Number: 121307-OAA Targeting Outreach and Service Report Plan-KP

TO: All Older American Act Title IIIB and Title IIIE Providers

FROM: Katie Parkinson, Senior Program Manager (Extension 225)

DATE: December 13, 2007

SUBJECT: Outreach Targeting and Service Report

cc: Program Managers, Gloria Schuyler, Maureen Kelly

The purpose of this Notice of Instruction is to inform you that effective January 2008 Older American Act Title IIIB and IIIE Providers will be required to begin completing a quarterly Outreach Targeting and Service Report due at the end of each quarter. The first Outreach Targeting and Service Report will be due to WCFAAA by April 15, 2008 and should accompany your outreach and educational activity logs submitted for that same period.

The purpose of the Outreach Targeting and Service Report is to provide assurance that each provider receiving Federal funding is targeting and serving low income, minority and rural consumers as outlined in your Service Provider Application and required by the Older Americans Act. In addition, this report will capture the number of unduplicated consumers served during the year and document units of service achievement.

As an update to the Area Plan in 2008, Title IIIE Caregiver Providers were required to establish goals to address additional targeting factors included in the Older Americans Act as amended in 2006, relating to Title IIIE Caregiving. The five goals and objectives are as follows:

- Caregivers of older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction;
- Grandparents or older individuals who are relative caregivers who provide care for children with severe disabilities;
- Caregivers who are older individuals with greatest social need;

- Caregivers who are older individuals with greatest economic need (with particular attention to low-income older individuals); and
- Caregivers who are older individuals who provide care to individuals with severe disabilities, including children with severe disabilities.

Each of these five categories is captured on the Outreach Targeting and Service Report. It is the intent of this report to provide a mechanism for Title III E Providers to give an account on their progress targeting and serving these at risk caregiving groups.

For additional information on completing the Outreach Targeting and Service Report, see the attached instructions. WCFAAA greatly appreciates the assistance and cooperation of you and your staff with implementation on this new process. If you have any questions about this request, please contact your program manager. Thank you

Attachment: Outreach Targeting and Service Report Instructions
Outreach Targeting Report Form

INSTRUCTION SHEET FOR

OAA QUARTERLY OUTREACH TARGETING AND SERVICE REPORT FOR PROJECT YEAR

1. **Reporting for:** ☐ Title IIIB Provider or ☐ Title IIIE Provider

Check the appropriate box and type the name of the provider agency in the blank. ***Agencies which provide services for both Title IIIB and Title IIIE will need to complete separate "Outreach Targeting and Service Report" forms each quarter for both programs.***

3. **Quarter Ending:** Mark within the parentheses the quarter the report covers. The contract covers a period of one year and begins on January 1.

NUMBER OF UNDUPLICATED PERSONS SERVED BY PROJECT YEAR-TO-DATE

Unduplicated: During each contract period the numbers of persons served are counted by providers only the first time the person is served. Each individual is counted only once during this time period when determining the unduplicated count, whether they were served once or multiple times. If a provider has several services, each service will have its own unduplicated count, even if the same person receives several different services.

1. **Minority:** Based on the total number of consumers to be served throughout the year, a percentage will be minority. This number should be based on current demographics for your covered area and the targeting plan to reach minority consumers. Record the minority consumer goal to be served for the program year (i.e. 14% of those served will be minority age 60+ persons) and the current year achievement in serving these minority consumers. The following constitute minority categories: Black, Hispanic, Asian and Pacific Islander, or American Indian. Asian includes Japanese, Chinese, Filipino, Korean, Asian Indian, and Vietnamese. Pacific Islander includes Hawaiian, Guamanian, and Samoan. Hispanic includes Mexican-American, Mexican, and Chicano, Puerto Rican, Cuban and other Spanish / Hispanic origin.
2. **Low Income:** Based on the total number of consumers to be served throughout the year, a percentage will be low income (125% of the poverty level or lower). This number should be based on current demographics for your covered area and the targeting plan to reach low income consumers. Record the low income consumer goal for the program year (i.e. 15% of those served will be low income age 60+ low persons) and the current year achievement in serving low income consumers.

3. Rural: Based on the total number of consumers to be served throughout the year, a percentage will be from a rural area. This number should be based on current demographics for your covered area and the targeting plan to reach rural consumers. Record the rural consumer served goal for the program year (i.e. 14% of those served will be from a rural area age 60+ persons) and the current year achievement in serving rural consumers. The definition of a rural area, as established by the Department of Elder Affairs, is an area with a population density of less than 100 individuals per square mile or an area defined by the most recent U.S. Census as rural.

❖ WCFAAA has completed a zip code analysis to identify rural areas for each county within PSA 6 for providers to utilize when targeting OAA services.

For III E Caregiver Providers Only:

Record the total number of caregivers served during the current contract year that meet the goals/objectives outlined below. Each quarter this number should increase.

1. Caregivers of older individual with Alzheimer's or related neurological brain dysfunction: Of the number of caregiver's served, how many are caregivers of older individuals with brain dysfunction.
2. Grandparents of children with disabilities: Of the number of caregivers served, how many are caregivers of grandchildren who provided care for children with disabilities
3. Caregivers of older individual w/greatest social needs: Of the number of caregivers served, how many are caregivers who are older individuals with greatest social need (i.e. rurally isolated, socially isolated, lack supportive network).
4. Caregivers of older individual with economic need: Of the number of caregivers served, how many are caregivers who are older individuals with the greatest economic need (with particular attention to low-income individuals).
5. Caregivers of older individual who provide care to those with disability: Of the number of caregivers served, how many are caregivers who are older individuals who provide care to individuals with severe disabilities, including children with severe disabilities.

SERVICE CATEGORY INFORMATION:

OAA Providers using CIRTS: A Discoverer workbook is available online which will allow providers to obtain the CIRT S figures for the OAA Quarterly Outreach Targeting and Service Report form. The workbook contains three worksheets tabs and will provide all the information needed to report under the Service Category section:

YTD Units — this will provide the services, contract/actual clients and units, and percentages

Qtr Units — this will provide the clients and units served per quarter

Wait List — this will provide the current OAA wait list by service

OAA Providers not using CIRTS: Providers will need to continue to manually log and track information to be reported under the Service Category section.

For each service provided by the project, report the following:

1. Unduplicated Persons to be Served for the Year: For each service listed in the grant, indicate the number of unduplicated persons to be served as listed in the service provider application.
2. Unduplicated Persons Served Year-to-Date: For each service provided, list the total number of unduplicated persons served since the beginning of the contract period. See description of unduplicated above.
3. Percentage of Achievement - Unduplicated Persons: Divide the number of unduplicated persons served year-to-date by the number of persons to be served for the year. Enter the result in this space.
4. Contracted Units of Service for the Year: For each service listed in the grant, indicate the number of units to be provided in the year, as stated in the service provider application and unit rate agreement.
5. Units of Service This Quarter: For each service provided, list the total number of units completed during this quarter.
6. Units of Service Year-to-Date: This is a cumulative number which combines the current quarter's units with any previous quarter which has already occurred.
7. Units of Service Year-to-Date Entered in CIRTS: Enter the number of units entered in CIRTS from the beginning of the contract year through this report period.
8. Percentage of Achievement - Units: Divide the number of units of service year-to-date by the number of units contracted for the year. Enter the result in this space.
9. CIRTS Wait List: OAA Registered Services (Adult Day Care, Chore, Homemaker, Congregate Meals, Home Delivered Meals and Nutrition Counseling) enter number of persons who have requested service and have been assessed and entered into CIRTS as "APCL." OAA Non-Registered Services enter "Not Applicable."
10. Prepared by/Title: Type the name and title of the person who prepared the report.

11. Date: Type the date the report was completed.
12. Reviewed by: The signature of the Project Director is required.
13. Date: Type the date the report was reviewed by the Project Director.