

INSTRUCTIONS FOR THE AGING UNIT SELF-ASSESSMENT | 2017

The purpose of the aging unit self-assessment is to provide the aging unit staff and commission on aging members with a structured approach to conducting an annual review of the:

- Aging unit's compliance with the Wisconsin Elders' Act.
- Activities to help older people advocate for themselves.
- Aging unit's progress on the local aging plan for older people.
- Important events or accomplishments not covered in the aging plan.

Compliance with the Wisconsin Elders' Act is a legal requirement. The local aging plan is a contractual obligation of the county or tribe.

Process

- Upon completion, this self-assessment must be sent **electronically in MS Word** to GWAAR (sarah.cowen@gwaar.org) by [March 16, 2018](#). Please do not fax/mail.
- The self-assessment covers the calendar year of [2017](#).
- The self-assessment should be reviewed and approved by the commission on aging prior to submittal to GWAAR. Documentation of that review does NOT need to be submitted but the date of approval should be noted where requested.
- If an aging unit is out of compliance, a corrective action plan is required by April 20, 2018.
- Please use an **orange-colored font** for any 2017 goal progress notes.

Part I: Compliance With the Wisconsin Elders' Act

Chapter 46.82 of the Wisconsin Statutes sets certain legal requirements for aging units. Please refer to Section 3-D (Statutory Requirements for the Structure of the Aging Unit) in your 2016-2018 Aging Plan to answer the questions. Indicate the name of your Commission on Aging and list the current members, including the start date and date their final term ends.

Part II: Activities to Help Older People Advocate for Themselves

Answer the three questions about how the aging unit has informed and taught older people about aging issues and on how the aging unit advocates on behalf of older people. Advocating for older people and helping older people advocate for themselves is the major function of the aging network.

Part III: Progress on the Aging Unit Plan for Serving Older People

Provide a brief update on the progress made on the goals in each of the focus areas in the previous year. These activities are required of all aging units.

Part IV: Progress on the Aging Unit Plan for Serving Older People - National Family Caregiver Support Program (NFCSP)

Aging units may contract for all or part of the services required under NFCSP. Note, this does not require the expenditure of NFCSP funds in all areas; however, the aging unit must collect data and report activity where required. Regardless of contractual relationships, the aging unit is responsible for the activities. Please indicate which agency provides the five minimum service requirements.

Additionally, the aging unit is responsible for partnering with other providers on caregiver activities in the county. Indicate if the aging unit belongs to a caregiver coalition. If yes, list the name of the coalition and activities conducted in the previous year. If no, please give plan for compliance.

[This section is not required for tribal aging units.]

Part V: Significant Accomplishments Not Included in the Aging Unit Plan

Aging units may accomplish many things independent of the aging plan. Unplanned circumstances may arise and require advocacy, outreach, organization, planning, etc. If you have an accomplishment or event completed in the previous year you would like us to be aware of, please identify it here.

[This section is not required.]

Part VI: Coordination Between Titles III and VI

The Older Americans Act, Sec. 306(a), requires aging agencies—to the maximum extent practicable—to coordinate services the agency provides under this title with services provided under title VI.

If the county includes part or all of a federally-recognized tribe, indicate how the county aging unit and the tribal aging unit will work together to coordinate and ensure the provision of services to tribal elders.

If the county does not include part or all of a federally-recognized tribe, please indicate: Not Applicable.