Tribal Aging Plan Guidance 2025–2027

The Tribal Aging Plan Guidance will assist aging units in the development of their 2025–2027 aging plan. All information included in the aging plan should be organized as listed in the table of contents; however, counties may personalize their plan by adjusting and formatting how the information appears within the plan.

Below the aging plan outline is additional guidance for each section. To further support plan development, visit the [Greater Wisconsin Agency on Aging Resources (GWAAR) 2025–27 Aging Plans](https://gwaar.org/plansamendmentsassessments) website for additional aging plan resources.

Our shared goal is to make aging unit plans visually and physically accessible to the public. Approved aging unit plans for 2025–2027 will be stored on the GWAAR Aging -County-Tribal Aging Plans SharePoint database. A link to the database will be posted on the [GWAAR 2025–27 Aging Plans](https://gwaar.org/plansamendmentsassessments) website and available to the network and public.

## Aging plan outline

Please provide a table of contents with page numbers that includes the following sections:

* Executive summary
* Context
* Development of the aging plan
	+ Community engagement
	+ Partners and resources
	+ Public hearings
* Goals and strategies
* Program advancement
	+ Community engagement and public input
	+ Title III and Title VI coordination
	+ Aging unit integration and collaboration with the tribal aging and disability resource specialist
	+ Emergency preparedness
* Organizational structure and leadership of the tribal aging unit
	+ Primary contact
	+ Organizational chart of the aging unit
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	+ Statutory requirements for the structure of the aging unit
	+ Policy-making body
	+ Advisory committee
* Budget summary
* Verification of intent
* Appendices

## Aging plan content

### Executive summary

The executive summary should stand alone in summarizing the aging unit’s efforts during the plan cycle of 2025–2027 and emphasize the needs expressed by older adults and their caregivers through local community engagement or public input activities.

To help educate the public, stakeholders, and decision-makers, provide a concise overview of the aging unit’s role within the community including mission, vision, and values. In addition, highlight the aging unit’s long-term vision for the evolution of aging and disability programs and services on behalf of older adults and their caregivers in the community.

### Context

The context sets the stage for the aging plan and conveys a clear, yet concise, description of the current and future needs of tribal elders and their caregivers, and the critical issues, challenges, and opportunities facing the aging unit and its services in the community. Describe how the aging network is organized to support services in the community including partner interactions and resource sharing.

Answer the following demographic questions using the datasets listed below. Aging units are encouraged to reference additional resources that provide further insight to the gaps in current programming and services.

* What are the age trends for tribal elders in the tribe?
	+ Current population of tribal elders the aging unit serves.
	+ Population projections for age 60+ by 2030 and 2040.
* How do needs differ across rural and urban, income levels, and generations?
	+ If applicable, the distribution of urban and rural areas.
	+ Relevant social and economic characteristics such as age (especially 60+), income, food insecurity, employment, education, housing, access to health care, and mental health supports.

Provide references for sources of information used to develop this section of the plan. Sources of information may include data from census, state reporting systems, Title VI surveys, Indian Health Services departments, and other tribal governmental agencies, etc.

### Development of the aging plan

This section of the plan should provide evidence of a commitment by the aging unit to engage with the public in the development of the aging plan. A cornerstone of the Older Americans Act (OAA) is that tribal elders have full participation in the planning and operation of community-based services. People in the community must be afforded opportunities to be part of the planning, express their ideas and concerns about current supports and services, and state their needs for the future.

#### Community engagement

This section of the aging plan is a summary of community engagement. Community engagement reports should be submitted as an appendix to the aging plan.

Summarize the aging unit’s community engagement strategies including methods, activities, and targeted outreach. Describe what the aging unit learned from the community about issues, challenges, and opportunities most critical to tribal elders and their caregivers. Specify how engaging community members in the planning process influenced and informed plan development.

#### Partners and resources

Specify how engaging partners and the policy-making body in the planning process influenced and informed plan development. As community resources, they help establish relationships and build connections with community members to learn about the supports and services they see as essential and most impactful. Describe how the aging unit and its partners interact, coordinate, and share resources to meet the needs of tribal elders.

#### Public hearings

This section of the aging plan is a summary of the public hearing(s). Public hearing reports should be submitted as an appendix to the aging plan. Aging units must hold at least one public hearing prior to the submission of the aging plan.

Public hearings are separate from community engagement activities. The public hearing process takes place after the draft plan is written and is an additional opportunity to collect feedback and comments to improve the plan prior to the tribal governing body approving the final aging plan.

Summarize the aging unit’s public hearing process. Include comments from tribal community members and indicate changes made to the draft version of the plan because of input collected during the public hearing.

### Goals and strategies

This section describes the aging unit’s goals, strategies, and tools to document efforts and accomplishments for the plan period of 2025–2027. Aging units should clearly state each goal, list specific strategies, and define how the goal will be measured.

The [Goal Writing Guidance and Template](https://gwaar.org/api/cms/viewFile/id/2008164) is an effective tool for goal development. Aging units are encouraged to organize their goals using the template provided. Insert a goal template into the body of the aging plan for each of the required focus areas. Required focus areas include at least one goal to address an emerging need, a quality issue, or a gap in the services system for each of the OAA Title III program areas: III-B Supportive Services, III-C1 and/or III-C2 Nutrition Program, and III-D Evidence-Based Health Promotion. In addition, there are three aging network values: person centeredness, equity, and advocacy. At least one goal is required to address each of these, either as a stand-alone goal or within one of the OAA Title III program areas mentioned above. Aging units are not required to insert the goal writing guidance section into the body of the aging plan but are encouraged to retain their notes for ongoing planning and tracking purposes.

### Program advancement

#### Community engagement and public input

Describe the aging unit’s approach to enhance the amount and quality of community engagement and public input into aging plan and program development, in an ongoing effort to increase and improve interaction with community members about aging programs and services.

#### Title III and Title VI coordination

The OAA and Administration for Community Living require coordination between Title III and Title VI. Describe the aging unit’s efforts to create and facilitate partnerships with Title III to increase opportunities for the utilization of services by tribal nation members.

#### Aging unit integration and collaboration with the tribal aging and disability resource specialist

Every tribal aging unit has a connection to a tribal aging and disability resource specialist (ADRS). Describe the aging unit’s efforts to coordinate with the tribal ADRS to meet the needs of tribal elders and their caregivers.

#### Emergency preparedness

Reference lessons learned and partnerships formed during the COVID-19 public health emergency. Describe the aging unit’s approach to emergency preparedness and document the existence of an emergency preparedness plan to ensure continuity of aging program operations and essential services in the event of crisis circumstances.

### Organizational structure and leadership of the tribal aging unit

#### Primary contact

Provide contact information for the primary person who will respond to questions and comments about the aging unit and three-year plan. Use the template provided below and insert it in the aging plan.

**Primary contact to respond to questions about the aging plan**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tribal Nation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### Organizational chart of the aging unit

Provide an organizational chart that depicts the place of the aging unit, policy-making body, and (where applicable) advisory committee, in relation to the tribal government.

Aging units may use their agency’s chart or the [Aging Unit Organizational Chart](https://gwaar.org/api/cms/viewFile/id/2004611) template provided by GWAAR. Insert the chart into the body of the aging plan. Tribal aging units may use other resources to create an organizational chart if desired.

The chart should be sufficiently detailed to explain the relationship between the aging unit and the tribal governing body. The chart should also indicate where each of the OAA Title III programs fit within the organization and the positions to carry out the roles and responsibilities. Aging units should provide the name of the aging director. Other staff names do not need to be included.

Identify in the chart the positions of the aging unit director, nutrition director, program nutritionist (including under contract), tribal elderly benefit specialist, health promotion coordinator, AFCSP family caregiver coordinator, transportation coordinator, and other aging unit staff (as applicable). It is understood that tribal aging unit directors often have multiple roles. If that is the case, indicate this in the chart by placing these roles under the position name. Information on other staff positions may also be included at the discretion of the aging unit.

#### Aging unit coordination with the aging and disability resource center

Briefly describe if there is a tribal arrangement that exists between the tribal aging unit and ADRC. This arrangement can be formal or informal.

#### Statutory requirements for the structure of the aging unit

This section refers to requirements in [Chapter 46.82 of the Wisconsin Statutes](https://docs.legis.wisconsin.gov/statutes/statutes/46/82). Consider if the aging unit is in compliance with the law.

State law does not permit a waiver of the requirements in this section. If a real or potential violation of the requirements of [Chapter 46.82](https://docs.legis.wisconsin.gov/statutes/statutes/46/82) exists, contact GWAAR for assistance in arranging a corrective action plan. Failure to do so could result in non-approval of the plan and suspension of funding.

Use the template provided below and insert it in the aging plan.

|  |  |
| --- | --- |
| **Organizational structure:** Choose the option that represents the organizational structure of the aging unit. | **Check one** |
| (1) An agency of county/tribal government with the primary purpose of administering programs for older individuals of the county/tribe. |[ ]
| (2) A unit, within a county/tribal department with the primary purpose of administering programs for older individuals of the county/tribe. |[ ]
| (3) A private, nonprofit corporation, as defined in s. 181.0103 (17). |[ ]
| **Composition of the policy-making body:** Choose the option that represents the composition of the policy-making body. | **Check one** |
| For an aging unit that is described in (1) or (2) above, organized as a committee of the county board of supervisors/tribal council, composed of supervisors and, advised by an advisory committee, appointed by the county board/tribal council. Older individuals shall constitute at least 50% of the membership of the advisory committee and individuals who are elected to any office may not constitute 50% or more of the membership of the advisory committee. |[ ]
| For an aging unit that is described in (1) or (2) above, composed of individuals of recognized ability and demonstrated interest in services for older individuals. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission. |[ ]
| For an aging unit that is described in (3) above, the board of directors of the private, nonprofit corporation. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission. |[ ]
| **Full-time aging director:** The law requires that the aging unit have a full-time aging director. | **Check one** |
| The aging unit has a full-time aging director as required by law. |[ ]
| The aging unit does not have a full-time aging director as required by law. |[ ]

#### Policy-making body

The tribal governing and policy-making body, also called the commission on aging, must approve the aging unit’s aging plan. Evidence of review and approval of the draft and final version of the aging plan must be included as part of the plan. Attach evidence of this required involvement as an appendix to the aging plan. This may include descriptions of events, activities, or notes from meetings that provide evidence of involvement.

The commission is the policy making entity for aging services (46.82 (4) (a) (1)) and an aging advisory committee is not the commission.  There are term limits for the membership of the policy-making body.

List the official name of the tribal governing and policy-making body and chairperson in this section of the aging plan.

Official name of the tribal governing and policy-making body: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Chairperson of the tribal governing and policy-making body: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### Advisory committee

An advisory committee, sometimes referred to as the advisory council, is required if the policy-making body does not follow the Wisconsin Elders Act requirements for elected officials, older adults, and terms.

When an aging unit has both an advisory committee and a policy-making body, a key role of the advisory committee is to advise the policy-making body in the development of the aging plan and to advocate for older adults. Attach evidence of this involvement as an appendix to the aging plan. This may include descriptions of events, activities, or notes from meetings that provide evidence of involvement.

Chapter 46.82 (4) (b) (1) of the Wisconsin Statutes requires that the membership of the aging advisory committee (where applicable) must consist of at least 50% older people, and individuals who are elected to office may not constitute 50% or more of the membership. There are no term limit requirements for the membership of advisory committees.

The nutrition advisory council, which is a requirement of the OAA for the Elder Nutrition Program, is a separate body from the advisory committee required by Chapter 46.82.

List the official name of the advisory committee and chairperson in this section of the aging plan.

Official name of the advisory committee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Chairperson of the advisory committee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Budget summary

Aging units are required to submit an annual budget to GWAAR using a budget worksheet approved by the Bureau of Aging and Disability Resources. Final budgets for CY 2025 are to be submitted with the aging plan on November 8, 2024. Due dates for annual aging unit budgets for CY 2026 and 2027 will be determined in cooperation with GWAAR and BADR and communicated with aging units when the dates are set.

The budget worksheet is separate from the budget summary section of the aging plan. Aging units are required to copy the budget summary table from the budget worksheet and insert it into the aging plan. The budget summary must be clearly posted on a public webpage for review following final approval by the tribal governing body.

In addition to the budget summary table, aging units may choose to add pie charts or graphs to highlight how funds are spent for services and supports for tribal elders and caregivers. This is an opportunity to show the public how Title III funds are spent including the proportions of local, state, and federal dollars.

### Verification of intent

The purpose of the verification of intent is to show that the tribal governing body has approved the plan. It further signifies the commitment of the tribal nation to carry out the plan. Copies of approval documents must be available in the offices of the aging unit. Use the template provided below and insert a signed copy of it in the aging plan.

**Signed verification of intent**

The person(s) authorized to sign the final plan on behalf of the tribal governing body must sign and indicate their title. This approval must occur before the final plan is submitted to the area agency on aging for approval.

We verify that all information contained in this plan is correct.

Signature of Chairperson of the Tribal Commission on Aging Date

Signature and Title of the Tribal Governing Board Representative Date

### Appendices

Aging units must include the following appendices with their aging plan: assurance of compliance with federal and state laws and regulations, community engagement reports, and public hearing reports. Additional appendices are welcome that support the aging unit plan.

* Assurance of compliance with federal and state laws and regulations
	+ Tribal aging units must review, sign, and include the Assurances of Compliance with Federal and State Laws and Regulations document as an appendix to their aging plan when submitting to the area agency on aging. The assurances need not be included with copies of the plan distributed to the public.
* Community engagement reports
	+ Complete one [Community Engagement Report](https://gwaar.org/api/cms/viewFile/id/2007951) for each engagement method used to gather information and ideas from the public prior to developing the aging plan. At least two methods of engagement must be used. Tribal nations may use a variety of methods including information from their most recent Title VI application, one-on-one conversations with tribal elders, and other methods as needed.
* Public hearing reports
	+ Complete one [Public Hearing Report](https://gwaar.org/api/cms/viewFile/id/2007952) for each public hearing held to collect feedback and comments from the public to improve the draft plan prior to the policy-making body approving the final aging plan. Aging units must conduct one or more public hearings.