

118TH CONGRESS
2D SESSION

S. 3827

To amend the Older Americans Act of 1965 to require the Assistant Secretary for Aging to award grants to States, Indian tribes, and tribal organizations to create or implement Multisector Plans for Aging and Aging with a Disability, and for other purposes.

IN THE SENATE OF THE UNITED STATES

FEBRUARY 28, 2024

Mrs. GILLIBRAND (for herself and Mr. CASEY) introduced the following bill; which was read twice and referred to the Committee on Health, Education, Labor, and Pensions

A BILL

To amend the Older Americans Act of 1965 to require the Assistant Secretary for Aging to award grants to States, Indian tribes, and tribal organizations to create or implement Multisector Plans for Aging and Aging with a Disability, and for other purposes.

1 *Be it enacted by the Senate and House of Representa-*
2 *tives of the United States of America in Congress assembled,*

3 **SECTION 1. SHORT TITLE.**

4 This Act may be cited as the “Strategic Plan for
5 Aging Act”.

1 **SEC. 2. SUPPORTING MULTISECTOR PLANS FOR AGING**
 2 **AND AGING WITH A DISABILITY.**

3 (a) IN GENERAL.—Part A of IV of the Older Ameri-
 4 cans Act of 1965 (42 U.S.C. 3032 et seq.) is amended
 5 by adding at the end the following:

6 **“SEC. 423. SUPPORTING MULTISECTOR PLANS FOR AGING**
 7 **AND AGING WITH A DISABILITY.**

8 “(a) DEFINITIONS.—In this section:

9 “(1) AGING AND DISABILITY STAKEHOLDERS.—

10 “(A) IN GENERAL.—The term ‘aging and
 11 disability stakeholders’ means a group of indi-
 12 viduals with experience or expertise in aging or
 13 disability issues, which shall consist of—

14 “(i) representatives from area agen-
 15 cies on aging;

16 “(ii) covered individuals; and

17 “(iii) representatives from not less
 18 than 3 of the groups described in subpara-
 19 graph (B).

20 “(B) ADDITIONAL GROUPS.—The groups
 21 described in this subparagraph are the fol-
 22 lowing:

23 “(i) Advocates for covered individuals.

24 “(ii) Academics with expertise in
 25 aging or disability issues.

1 “(iii) Philanthropic organizations with
2 experience in supporting aging or disability
3 initiatives.

4 “(iv) Individuals and community part-
5 ners serving older individuals, including in-
6 dividuals employed by area agencies on
7 aging or by multipurpose senior centers.

8 “(v) Providers of aging or disability
9 services.

10 “(vi) Any other group of individuals
11 serving or representing covered individuals,
12 as determined appropriate by the Assistant
13 Secretary.

14 “(2) COVERED INDIVIDUALS.—The term ‘cov-
15 ered individuals’ means—

16 “(A) older individuals, including older indi-
17 viduals with disabilities;

18 “(B) individuals who are family members
19 of older individuals, including family members
20 of older individuals with disabilities;

21 “(C) paid caregivers, and unpaid care-
22 givers, of older individuals, including any such
23 caregivers of older individuals with disabilities;
24 and

25 “(D) older relative caregivers.

1 “(3) ELIGIBLE ENTITY.—The term ‘eligible en-
2 tity’ means a State, Indian tribe, or tribal organiza-
3 tion.

4 “(4) MULTISECTOR PLAN FOR AGING AND
5 AGING WITH A DISABILITY; MASTER PLAN FOR
6 AGING; PLAN.—The terms ‘Multisector Plan for
7 Aging and Aging with a Disability’, ‘Master Plan for
8 Aging’, and ‘Plan’ mean a multi-year planning proc-
9 ess, administered by an eligible entity, that convenes
10 cross-sector stakeholders, including aging and dis-
11 ability stakeholders, to collaboratively address the di-
12 verse needs of covered individuals.

13 “(5) OLDER INDIVIDUAL WITH A DISABILITY.—
14 The term ‘older individual with a disability’ means
15 an individual who—

16 “(A) is an older individual; and

17 “(B) is an individual with a disability, as
18 defined in section 3 of the Americans with Dis-
19 abilities Act of 1990 (42 U.S.C. 12102).

20 “(6) OLDER RELATIVE CAREGIVER.—The term
21 ‘older relative caregiver’ has the meaning given such
22 term in section 372.

23 “(7) QUALIFIED LEADER.—The term ‘qualified
24 leader’, with respect to an eligible entity, means—

1 “(A) the head of the eligible entity, or the
2 head of an agency or department of the eligible
3 entity;

4 “(B) a legislative committee of the eligible
5 entity; or

6 “(C) another leader of the eligible entity,
7 as determined appropriate by the Assistant Sec-
8 retary.

9 “(8) TARGETED SUBGROUP.—The term ‘tar-
10 geted subgroup’ means a subgroup of older individ-
11 uals (including older individuals with disabilities)
12 who are older individuals with greatest social need,
13 or greatest economic need, as a result of geographic
14 location, disability status, sexual orientation, gender
15 identity, sex characteristics, socioeconomic status,
16 language, immigration status, or other factors deter-
17 mined appropriate by the Assistant Secretary.

18 “(b) PURPOSE.—The purpose of this section is to
19 provide eligible entities with resources to create, coordi-
20 nate, implement, and evaluate cross-sector plans to im-
21 prove the health, well-being, and quality of life of covered
22 individuals, including targeted subgroups.

23 “(c) GRANTS.—

24 “(1) IN GENERAL.—The Assistant Secretary
25 shall award grants on a competitive basis in accord-

1 ance with this section to eligible entities to each cre-
2 ate or implement a Multisector Plan for Aging and
3 Aging with a Disability (also known as a ‘Master
4 Plan for Aging’) that meets the requirements under
5 paragraph (2). Such grants may be used in the cre-
6 ation or implementation stage of such a Plan.

7 “(2) PLANS.—A Plan created or implemented
8 by an eligible entity through a grant under this sec-
9 tion shall—

10 “(A) have a creation or implementation
11 process that is informed or led by a working
12 group of aging and disability stakeholders that
13 reflects the diversity and demographics of the
14 population in the jurisdiction of the eligible en-
15 tity;

16 “(B) serve as a strategic planning resource
17 that helps the eligible entity work across agen-
18 cies or departments of the eligible entity (in-
19 cluding political subdivisions of the eligible enti-
20 ty), and through collaborations with other eligi-
21 ble entities receiving such a grant to serve an
22 area in the jurisdiction of the first eligible enti-
23 ty, to transform the infrastructure and coordi-
24 nation of key services, supports, and initiatives
25 described in paragraph (3) for covered individ-

1 uals, through public or private programs oper-
2 ating in the jurisdiction of the eligible entity;

3 “(C) enable a qualified leader of the eligi-
4 ble entity to communicate a clear vision, and
5 priorities, for a period of not less than 10 years
6 for the eligible entity with respect to the trans-
7 formation described in subparagraph (B);

8 “(D) guide policy of the eligible entity (in-
9 cluding a political subdivision of the eligible en-
10 tity), including through public or private pro-
11 grams, and through funding priorities, to assist
12 people in the jurisdiction of the eligible entity in
13 aging with dignity and autonomy;

14 “(E) include at least one goal for each of
15 the key aging issues described in paragraph (4)
16 and develop initiatives to carry out each such
17 goal;

18 “(F) be more comprehensive than the area
19 plans approved under section 306 by the State
20 agency prior to the date of the creation of the
21 Plan;

22 “(G) be more comprehensive than the
23 State plans approved under section 307 by the
24 Assistant Secretary prior to the date of the cre-
25 ation of the Plan; and

1 “(H) be created through a planning pro-
2 cess that builds on the planning processes for
3 the area plans described in subparagraph (F)
4 and the State plans described in subparagraph
5 (G).

6 “(3) KEY SERVICES, SUPPORTS, AND INITIA-
7 TIVES.—The key services, supports, and initiatives
8 described in this paragraph may include—

9 “(A) disease prevention and health pro-
10 motion services, long-term care services and
11 supports, human services, and any other public
12 health or health care, services, supports, or ini-
13 tiatives;

14 “(B) services, supports, and initiatives
15 with respect to—

16 “(i) retirement;

17 “(ii) nutrition and food security;

18 “(iii) economic security, including
19 benefits access and job training and place-
20 ment;

21 “(iv) elder rights protection and au-
22 tonomy;

23 “(v) housing;

24 “(vi) education;

25 “(vii) transportation;

1 “(viii) social engagement; and

2 “(ix) broadband access;

3 “(C) services, supports, and initiatives for
4 assisting covered individuals during a major
5 disaster or emergency declared by the President
6 under section 401 or 501 of the Robert T. Staf-
7 ford Disaster Relief and Emergency Assistance
8 Act (42 U.S.C. 5170, 5191), or any other nat-
9 ural disaster declared by the Governor of the
10 applicable State; and

11 “(D) any other services, supports, or ini-
12 tiatives with respect to covered individuals, as
13 determined appropriate by the eligible entity.

14 “(4) KEY AGING ISSUES.—The key aging issues
15 described in this paragraph are each of the fol-
16 lowing:

17 “(A) Supporting the ability of older indi-
18 viduals to be stably and safely housed, which
19 may include supporting their ability to age well
20 in the setting of their choice and to access
21 homelessness prevention services.

22 “(B) Expanding access to disease preven-
23 tion and health promotion services and health
24 care, including behavioral health care and sub-
25 stance use disorder services.

1 “(C) Promoting age-friendly communities,
2 as defined in section 203(c)(9).

3 “(D) Addressing the ability of older indi-
4 viduals to access long-term services and sup-
5 ports, including access to caregivers and home
6 and community-based services.

7 “(E) Expanding access to services that
8 promote elder justice and reduce elder abuse,
9 neglect, and exploitation.

10 “(F) Promoting economic security and re-
11 tirement security and reducing poverty for cov-
12 ered individuals.

13 “(G) Promoting social connection and re-
14 ducing social isolation and loneliness for cov-
15 ered individuals.

16 “(H) Improving equity for covered individ-
17 uals.

18 “(I) Ensuring public spaces are accessible
19 to, including safe for, older individuals, includ-
20 ing older individuals with disabilities.

21 “(J) Ensuring access to healthy and af-
22 fordable foods and reducing food insecurity,
23 hunger, and malnutrition.

24 “(d) ELIGIBILITY.—To be eligible for a grant under
25 this section, an eligible entity shall submit an application

1 to the Assistant Secretary at such time, in such manner,
2 and containing such information as the Assistant Sec-
3 retary may require, including—

4 “(1) information demonstrating the commit-
5 ment of the eligible entity to creating or imple-
6 menting a Plan, as evidenced by—

7 “(A) an Executive order issued by the head
8 of the eligible entity, or legislation enacted in
9 the jurisdiction of the eligible entity, author-
10 izing a Plan;

11 “(B) a letter from a qualified leader of the
12 eligible entity demonstrating the commitment of
13 the eligible entity to working across government
14 agencies or departments of the eligible entity,
15 as well as with aging and disability stakeholders
16 and other stakeholders in the public and private
17 sectors, to create or implement a Plan; and

18 “(C) any other declarations, activities, or
19 actions as determined appropriate by the As-
20 sistant Secretary;

21 “(2) a description of—

22 “(A) the working group described in sub-
23 section (c)(2)(A) that the eligible entity has
24 convened or plans to convene; and

1 “(B) any other anticipated activities and
2 programs (such as public hearings, public com-
3 ment periods, or listening sessions) to support
4 creating or implementing a Plan that reflects
5 demonstrated input from aging and disability
6 stakeholders, including covered individuals, and
7 other members of the public, including input
8 from members of Indian Tribes or tribal organi-
9 zations;

10 “(3) an assessment of the needs of covered indi-
11 viduals, including targeted subgroups, served by the
12 eligible entity;

13 “(4) a consideration of varying needs of popu-
14 lations across different types of geographies in the
15 jurisdiction of the eligible entity, including urban,
16 rural, and frontier, as applicable; and

17 “(5) details on how the Plan will comply with
18 subparagraphs (F), (G), and (H) of subsection
19 (c)(2).

20 “(e) AWARDS.—

21 “(1) IN GENERAL.—The Assistant Secretary
22 shall award not more than 65 grants under this sec-
23 tion during the 5-year period beginning on the date
24 of enactment of this section.

1 “(2) SET ASIDE.—Of the grants awarded under
2 paragraph (1), the Assistant Secretary shall award
3 not less than 10 grants to eligible entities that are
4 Indian Tribes or tribal organizations.

5 “(3) PROCESS.—The Assistant Secretary shall
6 establish a process for—

7 “(A) selecting, including for prioritizing,
8 eligible entities to receive a grant under this
9 section; and

10 “(B) subject to paragraph (4), determining
11 the amount of each such grant, which shall in-
12 clude a tiered system depending on the popu-
13 lation in the jurisdiction of the eligible entity.

14 “(4) MAXIMUM AMOUNT.—No grant awarded
15 under this section to an eligible entity shall exceed
16 \$500,000.

17 “(5) TERMS.—

18 “(A) IN GENERAL.—An eligible entity re-
19 ceiving a grant under this section shall—

20 “(i) receive a total amount for the
21 grant as a lump sum; and

22 “(ii) subject to subparagraph (B), ob-
23 ligate and expend such total amount in ac-
24 cordance with this section not later than 3
25 years after receiving such lump sum.

1 “(B) EXTENSION OF AVAILABILITY.—An
2 eligible entity may, pursuant to an agreement
3 with the Assistant Secretary, obligate and ex-
4 pend amounts from a grant under this section
5 in accordance with the requirements of this sec-
6 tion after the 3-year period described in sub-
7 paragraph (A)(ii).

8 “(f) DEADLINE.—In the case of a grant awarded
9 under this section to create a Plan, the eligible entity re-
10 ceiving the grant shall create the Plan and begin imple-
11 menting the Plan not later than 2 years after receiving
12 the grant.

13 “(g) ASSESSMENT AND EVALUATION PROCESS.—

14 “(1) DEVELOPMENTAL ASSESSMENT.—Not
15 later than 1 year after receiving a grant under this
16 section, the eligible entity receiving the grant shall
17 submit to the Assistant Secretary a developmental
18 assessment. Such assessment may include—

19 “(A) 3 or more goals with respect to the
20 Plan that the eligible entity commits to ad-
21 dressing in the final Plan described in para-
22 graph (2)(A);

23 “(B) demonstrated use of data metrics to
24 inform the goals of the Plan, which data
25 metrics are derived from—

1 “(i) datasets or qualitative data with
2 respect to the population in the jurisdiction
3 of the eligible entity; and

4 “(ii) nationwide datasets or quali-
5 tative data, with an awareness that na-
6 tional datasets may not include data with
7 respect to Indian tribes and tribal organi-
8 zations;

9 “(C) demonstrated involvement with 3 or
10 more governmental departments or agencies of
11 the eligible entity on creation or implementation
12 of the Plan;

13 “(D) demonstrated input from—

14 “(i) the working group described in
15 subsection (c)(2)(A) convened by the eligi-
16 ble entity; and

17 “(ii) any other aging and disability
18 stakeholders;

19 “(E) demonstrated input from other indi-
20 viduals who will be impacted by the Plan;

21 “(F) as applicable, demonstrated incorpo-
22 ration of aging, disability, and older relative
23 caregiver plans and initiatives existing on the
24 day before the receipt of the grant in the juris-
25 diction of the eligible entity, which may include

1 such existing age-friendly plans, Tribal plans
2 and resolutions, initiatives in area plans sub-
3 mitted under section 306 and State plans sub-
4 mitted under section 307, and working groups
5 or task forces related to aging, disability, or
6 older relative caregiver initiatives;

7 “(G) demonstrated assurances that the eli-
8 gible entity agrees to make available (directly or
9 through public or private entities) non-Federal
10 contributions towards the costs of the Plan; and

11 “(H) as applicable, a timeline and working
12 plan for finalizing the Plan and beginning im-
13 plementation of the Plan not later than 2 years
14 after the grant is awarded.

15 “(2) IMPLEMENTATION ASSESSMENT.—Not
16 later than 2 years after receiving a grant under this
17 section, the eligible entity receiving the grant shall
18 submit to the Assistant Secretary an implementation
19 assessment. Such assessment shall include—

20 “(A) a final Plan, including 3 or more
21 goals for the Plan and short- and long-term pri-
22 orities or initiatives to meet each of those goals;

23 “(B) an update regarding all matters in-
24 cluded in the developmental assessment sub-
25 mitted under paragraph (1);

1 “(C) for each priority or initiative de-
2 scribed in subparagraph (A), identified bench-
3 marks or data metrics that are identified in a
4 publicly accessible way such as through a data
5 dashboard or in a report;

6 “(D) a plan for accountability that in-
7 cludes—

8 “(i) demonstrated commitment of a
9 qualified leader of the eligible entity to exe-
10 cute and oversee such plan for account-
11 ability, as evidenced by information deter-
12 mined appropriate by the Assistant Sec-
13 retary;

14 “(ii) one or more departments or
15 agencies of the eligible entity listed as ac-
16 countable for each priority or initiative de-
17 scribed in subparagraph (A);

18 “(iii) a plan to continue to engage
19 aging and disability stakeholders, and
20 other key players or partners as deter-
21 mined by the eligible entity, through advi-
22 sory groups, public hearings held by the
23 implementation committee as described in
24 clause (iv)(II)(cc), or other means;

1 “(iv) the establishment of an imple-
2 mentation committee, which shall—

3 “(I) consist of the working group
4 described in subsection (c)(2)(A) con-
5 vened by the eligible entity and as ap-
6 plicable other regional, State, local, or
7 Tribal participants as determined ap-
8 propriate by the eligible entity; and

9 “(II) be responsible for—

10 “(aa) assisting in ensuring
11 that the goals of the Plan de-
12 scribed in subparagraph (A) are
13 implemented;

14 “(bb) participating in the
15 development of the progress re-
16 port described in subparagraph
17 (E); and

18 “(cc) holding public hear-
19 ings, with an opportunity for
20 public comment, for the purposes
21 described in clause (iii); and

22 “(v) a plan for identifying and re-
23 sponding to any disparities in access to key
24 services, supports, and initiatives in the ju-

1 jurisdiction of the eligible entity as described
2 in subsection (c)(3); and

3 “(E) a progress report schedule that in-
4 cludes—

5 “(i) an established process for bi-year-
6 ly updates to the Plan throughout a 10-
7 year period; and

8 “(ii) opportunities for input from
9 aging and disability stakeholders and any
10 other individuals impacted by the Plan.

11 “(h) CONSULTATION.—In carrying out this section,
12 the Assistant Secretary shall consult the Interagency Co-
13 ordinating Committee on Healthy Aging and Age-Friendly
14 Communities established under section 203(c).

15 “(i) TECHNICAL ASSISTANCE.—The Assistant Sec-
16 retary shall provide technical assistance to eligible entities
17 who are seeking or have received a grant under this sec-
18 tion in complying with the requirements of this section or
19 otherwise creating or implementing a Plan.

20 “(j) FUNDING.—

21 “(1) AUTHORIZATION OF APPROPRIATIONS.—

22 There is authorized to be appropriated for each of
23 fiscal years 2025 through 2029 to the Assistant Sec-
24 retary to remain available until expended \$6,500,000
25 to carry out this section.

1 “(2) ADMINISTRATIVE COSTS.—Of the amounts
2 appropriated under this section for a year, the As-
3 sistant Secretary shall use not more than 3 percent
4 to carry out subsection (i) and for any other admin-
5 istrative costs.”.

6 (b) INTERAGENCY COORDINATING COMMITTEE ON
7 HEALTHY AGING AND AGE-FRIENDLY COMMUNITIES.—
8 Section 203(c)(1) of the Older Americans Act of 1965 (42
9 U.S.C. 3013(c)(1)) is amended by striking “with respect
10 to aging issues and” and inserting “with respect to aging
11 issues, advising the Assistant Secretary on carrying out
12 the grant program under section 423, and”.

○