

**CALIFORNIA DEPARTMENT OF AGING**

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**PROGRAM MEMO**

CDA 1014 (Rev. 02/14)

<b>TO: Area Agencies on Aging Directors</b>		<b>NO.: PM 15-07 (P)</b>	
<b>SUBJECT: Area Plan</b>		<b>DATE ISSUED: June 5, 2015</b>	
<b>Area Plan Contracts, Budget Displays, and Budget Instructions SFY 2015-16</b>		<b>EXPIRES: June 30, 2016</b>	
<b>REFERENCES:</b>		<b>SUPERSEDES: PM 14-11 (P)</b>	
<b>PROGRAMS AFFECTED:</b>	<input type="checkbox"/> All <input checked="" type="checkbox"/> Title III-B <input checked="" type="checkbox"/> Title III-C1/C2 <input checked="" type="checkbox"/> Title III-D <input checked="" type="checkbox"/> Title III-E <input checked="" type="checkbox"/> Title VII <input type="checkbox"/> Title V <input type="checkbox"/> HICAP <input checked="" type="checkbox"/> Other: NSIP		

**Purpose**

This Program Memo (PM) transmits your Area Plan (AP) contracts and Budget Displays for State Fiscal Year (SFY) 2015-16. The California Department of Aging (CDA) transmitted planning estimates via email on April 16, 2015.

**Allocation Information**

To determine each Area Agency on Aging's (AAA) Title III/VII allocation, CDA used the methodology described below.

**Federal Title III/VII Funding**

To allocate federal funds, CDA used:

- Population factors consistent with federal requirements.
- The best available data to determine each Planning and Service Area's (PSA) relative proportion of persons with characteristics corresponding to each population factor.
- The following data sources to determine the number of persons statewide and in each PSA with characteristics corresponding to each population factor:

<b>Population Factors</b>	<b>Data Source</b>
Non-Minority 60+	2010 Census - Department of Finance Projections - 2014
Minority 60+	2010 Census – Department of Finance Projections - 2014
Low Income	2010 Census
Geographic Isolation	2010 Census
Medi-Cal eligible	Department of Health Care Services - 2014

*Continued on next page*

**Allocation Information,**  
*Continued*

**State Funding**

To allocate State Title III General Fund (GF), CDA:

- First, allocated GF to match designated federal funds as mandated by federal regulations, and
- Second, allocated the remaining GF for Maintenance of Effort to bring AAAs to a funding level consistent with the previous year’s total allocation for selected funds. CDA makes this Maintenance of Effort adjustment to the degree possible with available funds per Welfare and Institutions (W&I) Code Section 9112(c).

**Ombudsman Federal Funding**

To allocate federal funds for the Ombudsman Program, CDA:

- Allocated \$35,000 in baseline funding to each AAA, *unless*
  - The number of long-term care facility beds (i.e., skilled nursing facility, intermediate care facility, and residential care facility) in its PSA is below 500 beds;
  - The number of long-term care facilities is fewer than 10.

AAAs that fell below this threshold received a lower baseline allocation.

- Allocated the balance of federal funds pursuant to W&I Code Section 9179.5 using the following factors:

<b>Factor</b>	<b>Percentage</b>
Number of Long-Term Care Facilities	50 percent
Number of Long-Term Care Beds	40 percent
Square Miles in PSA	10 percent

This formula proportionally weights data on each PSA’s number of facilities, facility beds, and square miles.

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**Budget Display**

The AP Budget Display format enables AAAs to specify from which Federal Fiscal Year (FFY) funds are both requested and reported as expended for SFY 2015-16.

The first page of the AP Budget Display shows the final three (3) months of FFY 2015 federal funds and the first 3 months of SFY 2015-16 State funds.

- All funds on this page are available from July 1, 2015 through June 30, 2016; however, funds displayed on the first page for each funding category should be expended before funds for each funding category shown on the second page.
- None of these funds can be carried over into SFY 2016-17.

The second page of the AP Budget Display shows nine (9) months of FFY 2016 federal funds and the last 9 months of SFY 2015-16 State funds.

- AAAs can request FFY 2016 federal funds after October 1, 2015, which is the beginning of FFY 2016.
- All State funds are available from July 1, 2015 through June 30, 2016.

The third page of the AP Budget Display shows 12 months of Area Plan Contract funds for SFY 2015-16. This page shows both 3 months of FFY 2015 and 9 months of FFY 2016 federal funds and all SFY 2015-16 State funds.

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**Budget Submission Instructions & Due Date**

AAAs must submit one Original Area Plan Budget for SFY 2015-16 incorporating the amounts shown in their corresponding Budget Display.

Transfer requests must correspond to the funding shown on the first and second pages of the Budget Display.

The Area Plan Budget is due to each AAA's assigned CDA Fiscal Analyst no later than July 6, 2015.

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**Request for Funds and Expenditure Reporting**

When submitting an Area Plan contract Request for Funds, the 3-month period or 9-month period must be identified on the Supplemental Report (CDA 151), as shown on your Budget Display.

- FFY 2015 federal funds are available during the first 3 months of your Area Plan Contract, as shown on the first page of your Budget Display.
- FFY 2016 federal funds are available beginning October 1, 2015, as shown on the second page of the Budget Display.
- CDA will not process any SFY 2015-16 Area Plan Contract payments until your Original Area Plan Budget is approved and your contract fully executed.

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**2014-15  
Closeouts and  
Carry Over**

AAAs wishing to carry over unspent federal funds from the last 9 months of the SFY 2014-15 Area Plan Contract into the SFY 2015-16 Area Plan contract must submit a closeout by July 30, 2015.

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**Fiscal Inquires**

Please contact your assigned CDA AAA Fiscal Team Analyst if you have questions.

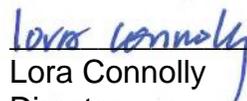
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**Attachment**

The SFY 2015-16 Area Plan Budget Displays and Statewide Summary are posted to CDA's website at:

[http://www.aging.ca.gov/ProgramsProviders/AAA/AAA\\_Budget\\_Displays/](http://www.aging.ca.gov/ProgramsProviders/AAA/AAA_Budget_Displays/)

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Lora Connolly  
Director