Area Agency on Aging SFY 2020

Budget Allocation (with instructions)

Total OAA Reimbursable & Cash-in-Lieu Funding

The amounts below, highlighted in orange are your State Fiscal Year 2025 Budget.
The Administration for Community Living (ACL) allows a transfer of Title IIIB and Title IIIC funds.
You cannot transfer more than 30% between part B & C.
You cannot transfer more than 40% of your part C funds between subpart I and II.
Make any desired changes in the yellow cells.

After completing the budget portion below, use these check figures to ensure all funds have been allocated

TOTAL REIMBURSABLE ALLOCATION STATE FUNDS	Allocation	Total Budget	Check Figures	Difference
State Service	211,100.00	211,100.00	211,100.00	-
State Transportation	0.00	0.00	-	-
State Nutrition	88,000.00	88,000.00	88,000.00	-
State Home Delivered Meals	340,000.00	340,000.00	340,000.00	-
State Nutrition 1-Time	232,500.00	232,500.00	232,500.00	-
State Respite	79,900.00	79,900.00	79900.00	-
State Respite-One Time	0.00	0.00	-	-
State Ombudsman	58,700.00	58,700.00	58700.00	-
State Action	22,687.00	22,687.00	22,687.00	-
State In-Home/Alternatives	462,400.00	462,400.00	462,400.00	-
State Alzheimer's and Dementia	9,400.00	9,400.00	9,400.00	-
Total	1,504,687.00	1,504,687.00	1,495,287.00	

FEDERAL FUNDS	Allocation	Title IIIC Transfers	Title IIIB & C Transfers	Total Budget	Check Figures	Difference
Title IIIB	312,600.00		5,000.00	317,600.00	317,600.00	-
Title IIIB CDC	0.00			0.00	-	-
Title IIIC1	392,000.00	-100,000.00	0.00	292,000.00	292,000.00	-
Title IIIC2	421,800.00	0.00	95,000.00	516,800.00	516,800.00	-
Title IIID	23,600.00			23,600.00	23,600.00	-
Title IIIE	170,300.00			170,300.00	170,300.00	-
Title VII Ombudsman	16,100.00			16,100.00	16,100.00	-
Title VII Elder Abuse Prevention	2,083.00			2,083.00	2,083.00	-
Alternatives - SSBG	152,500.00			152,500.00	152,500.00	-
SHIP	23,300.00			23,300.00	23,300.00	-
MIPPA	20,500.00			20,500.00	20,500.00	-
Title V Senior Employment	0.00			0.00	-	-
Senior Medicare Patrol	28,150.00			28,150.00	28,150.00	-
Senior Medicare Patrol - CB	0.00			0.00	-	-
Total	1,562,933.00	0.00	0.00	1,562,933.00	1,562,933.00	
Commodities	0.00			0.00	-	
Cash-In-Lieu (NSIP)	87,100.00			87,100.00	87,100.00	
Total	1,650,033.00			1,650,033.00	87,100.00	
TOTAL REIMBURSABLE BUDGET	3,154,720.00			3,154,720.00	3,145,320.00	

Area Agency on Aging SFY 2020
Budget Allocation (with instructions)
Older Americans Act Related Funds

State Statute (62A-3-105) requires Local match at least equal to 15% of State and Federal Service dollars, and 25% of State and Federal Administrative dollars for all State and Federal funds related to the Older Americans Act. The division interprets this to mean the total Federal Title III, NSIP, & Title VII, and State Service, Nutrition, Transportation, Home Delivered Meals, Respite, and Ombudsman. The division interprets the match requirement to be in total, and not by individual service code.
However, there are still some Federal requirements as far as the minimum amount of Local match per service code and the minimum amount of State funds.
In-kind match can only be used in Admin. Cash match must be used for all service programs.

INSTRUCTIONS:

Allocate your Older Americans Act related funds by entering the amounts in the yellow cells. The minimum State and Local amounts are calculated based on the entered Federal funds amounts entered. The calculation methods are included below for your reference.

ADMINISTRATION - AAD & RST

AAD

To calculate the Federally required minimum Local match in AAD Area Plan Administration, take the total Federal Funds, divide by 75%, then multiply by 25%. In-kind can be used for Local match.
To calculate the Federally required minimum State funds in AAD Area Plan Administration, take the total Federal Funds (including a carryover estimate), divide by 75%, multiply by 1/3 of 25%.
Up to 25% of total State funds can be used for Admin. Up to 10% of total Title III Federal funds can be used for Admin.

RST

There is no Federally required minimum Local match in RST Respite Care Administration. In-kind can be used for Local match.
To calculate the Federally required minimum State funds in RST Respite Care Administration, take the total Federal Funds (including a carryover estimate), divide by 75%, multiply by 25%.
Up to 25% of total State Respite funds can be used for Admin. Up to 10% of total Title III Federal funds can be used for Admin.

To calculate the total State required match requirement for AAD & RST, take the total State and Federal funds, multiply by 25%. Remember, you will need to meet the minimum State required match, even if the Federal required match is lower.

SERVICES

PDS, PDC

To calculate the Federally required minimum Local match in PDS & PDC, take the total Federal Funds, divide by 85%, multiply by 15%.
To calculate the Federally required minimum State funds in PDS & PDC, take the total Federal Funds (including a carryover estimate), divide by 85%, multiply by 15%.

CMM/CIC, HDM/CIH

To calculate the Federally required minimum Local match in CMM/CIC & HDM/CIH, take the total Federal Funds except NSIP, divide by 85%, multiply by 15%.
To calculate the Federally required minimum State funds in CMM/CIC & HDM/CIH, take the total Federal Funds except NSIP (including a carryover estimate), divide by 85%, multiply by 15%.

PHP, OMB, PEA

There is no Federally required minimum Local match in PHP, OMB, or PEA
There is no Federally required minimum State funds in PHP, OMB, or PEA.

RST

There is no Federally required minimum Local match in RST
To calculate the Federally required minimum State funds in RST Respite Care Case Management & Services, take the total Federal Funds except (including a carryover estimate), divide by 75%, multiply by 25%.

To calculate the total State required match requirement for the total Services, take the total State and Federal funds, multiply by 25%.

CALCULATION OF MINIMUM STATE FUNDS AND LOCAL MATCH (calculations based on cell entries below in Revenue Budget)

Minimum State Funds	11,630.00	16,905.88		16,787.94	32,119.71	0.00	0.00	36,379.00	35,219.33	71,598.33	0.00	0.00
Minimum Local Match	72,535.67	74,770.59		50,711.65	190,469.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00

CALCULATION OF MAXIMUM STATE AND FEDERAL FUNDS IN ADMIN

Maximum State Funds in AAD	217,900.00
Maximum Federal Funds in AAD	129,878.30

CALCULATION OF MAXIMUM STATE AND FEDERAL FUNDS IN ADMIN

Maximum State Funds in RST Admin	19,975.00
Maximum Federal Funds in RST Admin	17,030.00

Area Agency on Aging SFY 2020
Budget Allocation (with instructions)

REVENUE BUDGET REIMBURSABLE	AAD AREA PLAN ADMIN BUDGET	PDS SUPPORTIVE SERVICES BUDGET	ALZ ALZHEIMER'S AND DEMENTIA BUDGET	CMM/CIC CONGREGATE MEALS BUDGET	HDM/CIH HOME DLVRD MEALS BUDGET	PHP PREVENTIVE HEALTH BUDGET	RST RESPITE CARE: RST RESPITE CARE ADMIN BUDGET	RST RESPITE CARE: CASE MANAGEMENT BUDGET	RST RESPITE CARE: RST RESPITE CARE SERVICES BUDGET	RST RESPITE CARE BUDGET	OMB OMBUDSMAN BUDGET	PEA ELDER ABUSE PREVENSION BUDGET	TOTAL BUDGET
State Funds	112,937.00	136,300.00	9,400.00	23,746.00	598,617.00	0.00	19,425.00	34,800.00	25,675.00	79,900.00	58,700.00	0.00	1,019,600.00
State Service	38,120.00	136,300.00		0.00	36,680.00	0.00	0.00	0.00	0.00	0.00			211,100.00
State Transportation	0.00	0.00								0.00			0.00
State Nutrition	9,268.00			23,746.00	54,986.00					0.00			88,000.00
State Home Delivered Meals	59,042.00				280,958.00					0.00			340,000.00
One-time State Home Del. Mls	6,507.00				225,993.00					0.00			232,500.00
State Respite							19,425.00	34,800.00	25,675.00	79,900.00			79,900.00
State Respite One-Time							0.00	0.00	0.00	0.00			0.00
State Ombudsman										0.00	58,700.00		58,700.00
State Alzheimer's and Dementia			9,400.00										9,400.00
Federal Funds	104,670.00	287,400.00	0.00	285,395.00	546,035.00	23,600.00	5,980.00	74,337.00	79,983.00	160,300.00	16,100.00	2,083.00	1,425,583.00
Title IIIB	30,200.00	287,400.00								0.00			317,600.00
Title IIIB CDC										0.00			0.00
Title IIIC1	28,380.00			263,620.00						0.00			292,000.00
Title IIIC2	36,090.00				480,710.00					0.00			516,800.00
Title IIID						23,600.00				0.00			23,600.00
Title IIIE	10,000.00						5,980.00	74,337.00	79,983.00	160,300.00			170,300.00
NSIP (Cash-in-Lieu)				21,775.00	65,325.00					0.00			87,100.00
Title VII Ombudsman										0.00	16,100.00		16,100.00
Title VII Elder Abuse Prevention										0.00		2,083.00	2,083.00
TOTAL REIMBURSABLE	217,607.00	423,700.00	9,400.00	309,141.00	1,144,652.00	23,600.00	25,405.00	109,137.00	105,658.00	240,200.00	74,800.00	2,083.00	2,445,183.00
LOCAL RESOURCES													
Project Income	0.00	20,000.00	0.00	105,000.00	315,000.00	0.00	0.00	0.00	2,000.00	0.00	0.00	0.00	440,000.00
Fees/Collections	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
SSBG Local Discretionary	0.00	17,500.00	0.00	5,500.00	20,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	43,000.00
Other Federal	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other State	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fund Raising	0.00	18,052.00	0.00	13,052.00	13,052.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	44,156.00
Miscellaneous Revenue	0.00	51,000.00	0.00	26,000.00	30,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	107,000.00
Local Private	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Public	0.00	496,324.75	0.00	641,383.69	662,954.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,800,662.91
Required Cash Match	0.00	74,770.59	0.00	50,711.65	190,469.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	315,951.71
TOTAL LOCAL RESOURCES	0.00	677,647.34	0.00	841,647.34	1,231,475.94	0.00	0.00	0.00	2,000.00	0.00	0.00	0.00	2,750,770.62
TOTAL CASH	217,607.00	1,101,347.34	9,400.00	1,150,788.34	2,376,127.94	23,600.00	25,405.00	109,137.00	107,658.00	240,200.00	74,800.00	2,083.00	5,195,953.62
Required In-Kind Match	72,535.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	72,535.67
Additional In-Kind	0.00	273,156.43		181,321.43	60,805.44	0.00	0.00	0.00	0.00	0.00	5,000.00	0.00	520,283.30
TOTAL IN-KIND	72,535.67	273,156.43	0.00	181,321.43	60,805.44	0.00	0.00	0.00	0.00	0.00	5,000.00	0.00	592,818.97
GRAND TOTAL	290,142.67	1,374,503.77	9,400.00	1,332,109.77	2,436,933.38	23,600.00	25,405.00	109,137.00	107,658.00	240,200.00	79,800.00	2,083.00	5,788,772.58

If in-kind/non-cash match funds are used, please specify source and method of computation:

Total Local Match required by State Statute

	Required	Entered	*difference*
Local Admin Match			
Local Services Match			

AAD & PDC percentage of entire budget 16.12%

Area Agency on Aging SFY 2020
Budget Allocation (with instructions)

PDS - Access, In-Home, Legal

UT Admin Code R510-106 states that a minimum of 2% of your total IIIB allocation and total State Service allocation must be used for Legal Assistance, 8% for Access Services, and 8% for In-Home Services. These are billed in the PDS Supportive Services Code. AAAs which do not plan to fund a Title IIIB priority category of service at the required minimum percentage must request a waiver (see R510-106-2).
Please include any additional reimbursable amounts budgeted for Legal, In-Home, and Access.

	Billed under PDS			
	8% PDA ACCESS	8% PDH IN-HOME	2% PDL LEGAL	
Minimum Reimbursable	41,896.00	41,896.00	10,474.00	Calculated based on total State Service, IIIB budgets
Additional Reimbursable	0.00	0.00	0.00	
	41,896.00	41,896.00	10,474.00	

PDS - Training Funds, Transportation

Below are the budgets for Training and Transportation (both billed in the PDS Supportive Services Code). If you are planning on using any additional IIIB or State Service funds, please enter those amounts.

	Billed under PDS		
	Training Funds	Transportation	
Title IIIB Training	-		
minimum State Service	-	-	Calculated based on Federal Funds
Additional IIIB	0.00	0.00	
Additional State Service	0.00	0.00	
State Transportation		-	
	-	-	

Please complete the associated Cost Category Budget. These totals should match the revenue totals above.

COST CATEGORY BUDGET	AAD AREA PLAN ADMIN	PDS SUPPORTIVE SERVICES	ALZ ALZHEIMER'S AND DEMENTIA	CMM/CIC CONGREGATE MEALS	HDM/CIH HOME DLVRD MEALS	PHP PREVENTIVE HEALTH	RST RESPITE CARE ADMIN	RST RESPITE CARE CASE MANAGEMENT	RST RESPITE CARE SERVICES	RST RESPITE CARE	OMB OMBUDSMAN	PEA ELDER ABUSE PREVENSION	TOTAL
PROGRAM EXPENSE	0.00	1,374,503.77	9,400.00	1,330,561.77	2,432,290.38	23,600.00	0.00	109,137.00	107,658.00	216,795.00	71,951.00	2,083.00	5,461,184.92
Total Personnel and Fringe		0.00	6,400.00	11,455.00	34,365.00	19,000.00		88,150.00	54,750.00	142,900.00	63,097.00	2,083.00	279,300.00
Operating Costs		0.00	3,000.00	4,125.00	122,375.00	4,600.00		20,987.00	15,579.00	36,566.00	8,854.00	0.00	179,520.00
Subcontracts		1,374,503.77	0.00	1,314,981.77	2,275,550.38	0.00			37,329.00	37,329.00	0.00	0.00	5,002,364.92
CAPITAL OUTLAY								0.00	0.00	0.00	0.00	0.00	0.00
ADMINISTRATIVE EXPENSE	290,142.67	0.00	0.00	1,548.00	4,643.00	0.00	25,405.00	0.00	0.00	4,905.00	7,849.00	0.00	309,087.67
Total Personnel and Fringe	167,012.00	0.00	0.00	0.00	0.00	0.00	20,500.00			0.00	0.00	0.00	167,012.00
Operating Costs	100,285.67	0.00	0.00	0.00	0.00	0.00	2,135.00			2,135.00	0.00	0.00	102,420.67
Indirect Costs	22,845.00	0.00	0.00	1,548.00	4,643.00	0.00	2,770.00			2,770.00	7,849.00	0.00	39,655.00
GRAND TOTAL	290,142.67	1,374,503.77	9,400.00	1,332,109.77	2,436,933.38	23,600.00	25,405.00	109,137.00	107,658.00	221,700.00	79,800.00	2,083.00	5,770,272.59

Area Agency on Aging SFY 2020
Budget Allocation (with instructions)

ALM - IN HOME SERVICE PROGRAM (ALTERNATIVES)

There are no matching fund requirements for the In-Home Services/Alternatives Program
A maximum of 25% of funds can be used for ALM Administration

Maximum State Funds	115,600.00
Maximum Federal Funds	15,250.00

REVENUE BUDGET

REIMBURSABLE	ALM ADMIN BUDGET	ALM CASE MANAGEMENT BUDGET	ALM SERVICES BUDGET	TOTAL
State Funds	42,293.00	140,246.00	279,861.00	462,400.00
State In-Home/Alternatives	42,293.00	140,246.00	279,861.00	462,400.00
Federal Funds	15,250.00	45,819.00	91,431.00	152,500.00
Alternatives - SSBG	15,250.00	45,819.00	91,431.00	152,500.00
TOTAL REIMBURSABLE	57,543.00	186,065.00	371,292.00	614,900.00
LOCAL RESOURCES				
Project Income	0.00	0.00	0.00	0.00
Fees/Collections	0.00	0.00	1,000.00	1,000.00
SSBG Local Discretionary	0.00	0.00	0.00	0.00
Other Federal	0.00	0.00	0.00	0.00
Other State	0.00	0.00	0.00	0.00
Fund Raising	0.00	0.00	0.00	0.00
Miscellaneous Revenue	0.00	0.00	0.00	0.00
Local Private	0.00	0.00	0.00	0.00
Local Public	0.00	0.00	0.00	0.00
Required Cash Match	0.00	0.00	0.00	0.00
TOTAL LOCAL RESOURCES	0.00	0.00	1,000.00	1,000.00
TOTAL CASH	57,543.00	186,065.00	372,292.00	615,900.00
Required In-Kind Match	0.00	0.00	0.00	0.00
Additional In-Kind	0.00	0.00	0.00	0.00
TOTAL IN-KIND	0.00	0.00	0.00	0.00
GRAND TOTAL	57,543.00	186,065.00	372,292.00	615,900.00

If in-kind/non-cash match funds are used, please specify source and method of computation:

Please complete the associated Cost Category Budget. These totals should match the revenue totals above.

COST CATEGORY BUDGET

PROGRAM EXPENSE	0.00	186,065.00	372,292.00	558,357.00
Total Personnel and Fringe		170,690.00		170,690.00
Operating Costs		15,375.00	0.00	15,375.00
Subcontracts			372,292.00	372,292.00
CAPITAL OUTLAY		0.00	0.00	0.00
ADMINISTRATIVE EXPENSE	57,543.00	0.00	0.00	57,543.00
Total Personnel and Fringe	28,000.00			28,000.00
Operating Costs	2,700.00			2,700.00
Indirect Costs	26,843.00			26,843.00
GRAND TOTAL	57,543.00	186,065.00	372,292.00	615,900.00

Area Agency on Aging SFY 2020
Budget Allocation (with instructions)

NON-FORMULA FUNDS
RVP - ACTION PROGRAMS
There are no matching requirements with the State Action funds
State Action funds must be used for travel reimbursement support to volunteers.

HIC - HEALTH INSURANCE COUNSELING
There are no matching requirements with the SHIP funds.

SMP - SENIOR MEDICARE PATROL

SMP Senior Medicare Patrol funds, depending on the award, require match. Please refer to your Memo of Understanding for the match portion required.

SCM, SCW - TITLE V SENIOR EMPLOYMENT (SCSEP)

Title V Federal funds will only pay up to 90% of total costs; the State match portion is 0%, and the Local match portion is 10%. To calculate, take the total Federal funds, divide by 90%, multiply by 10%. Cash or in-kind funds can be used for match.
The maximum amount of SCSEP funds that can be used for Admin is 13.5%. (CFR 641.809 (a))

Maximum SCSEP Admin amount	0.00
Minimum SCSEP Program Local Match	0.00

REVENUE BUDGET REIMBURSABLE	RVP ACTION BUDGET	HIC HEALTH INSURANCE COUNSEL BUDGET	SMP SENIOR MEDICARE PATROL BUDGET	SCM SCSEP MANAGEMENT BUDGET	SCW SCSEP WAGES BUDGET	TOTAL SCSEP BUDGET	OTHER BUDGET
State Funds	22,687.00	43,800.00	28,150.00	0.00	0.00	0.00	0.00
State Action	22,687.00					0.00	
Federal Funds	0.00			0.00	0.00	0.00	0.00
SHIP		23,300.00				0.00	
MIPPA		20,500.00				0.00	
Senior Medicare Patrol			28,150.00			0.00	
Senior Medicare Patrol - CB			0.00			0.00	
Title V Senior Employment				0.00	0.00	0.00	
TOTAL REIMBURSABLE	22,687.00	43,800.00	28,150.00	0.00	0.00	0.00	0.00
LOCAL RESOURCES							
Project Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fees/Collections	0.00	0.00	0.00	0.00	0.00	0.00	0.00
SSBG Local Discretionary	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Federal	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other State	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fund Raising	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Private	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Public	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Required Cash Match	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL LOCAL RESOURCES	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL CASH	22,687.00	43,800.00	28,150.00	0.00	0.00	0.00	0.00
Required In-Kind Match	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Additional In-Kind	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL IN-KIND	0.00	0.00	0.00	0.00	0.00	0.00	0.00
GRAND TOTAL	22,687.00	43,800.00	28,150.00	0.00	0.00	0.00	0.00

If in-kind/non-cash match funds are used, please specify source and method of computation:

Area Agency on Aging SFY 2020

Budget Allocation (with instructions)

Please complete the associated Cost Category Budget. These totals should match the revenue totals above.

COST CATEGORY BUDGET	RVP ACTION	HIC HEALTH INSURANCE COUNSEL	SMP SENIOR MEDICARE PATROL	SCM SCSEP MANAGEMENT	SCW SCSEP WAGES	TOTAL SCSEP	OTHER
PROGRAM EXPENSE	22,687.00	39,236.00	25,260.00	0.00	0.00	0.00	0.00
Total Personnel and Fringe	0.00	33,225.00	21,400.00		0.00	0.00	0.00
Operating Costs	0.00	6,011.00	3,860.00		0.00	0.00	0.00
Subcontracts	22,687.00	0.00	0.00		0.00	0.00	0.00
CAPITAL OUTLAY	0.00	0.00	0.00		0.00	0.00	0.00
ADMINISTRATIVE EXPENSE	0.00	4,564.00	2,890.00	0.00	0.00	0.00	0.00
Total Personnel and Fringe	0.00	0.00	0.00	0.00		0.00	0.00
Operating Costs	0.00	0.00	0.00	0.00		0.00	0.00
Indirect Costs	0.00	4,564.00	2,890.00	0.00		0.00	0.00
GRAND TOTAL	22,687.00	43,800.00	28,150.00	0.00	0.00	0.00	0.00