

FY 2020 AREA PLAN GRANT BUDGET

Rev. 03/25/2019

Agency: Branch-St. Joseph Area Agency on Aging

Budget Period: 10/01/19 to 09/30/20

PSA: 3C

Date: 05/13/19

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SERVICES SUMMARY			
FUND SOURCE	SUPPORTIVE SERVICES	NUTRITION SERVICES	TOTAL
1. Federal Title III-B Services	148,970		148,970
2. Fed. Title III-C1 (Congregate)		98,606	98,606
3. State Congregate Nutrition		2,676	2,676
4. Federal Title III-C2 (HDM)		90,476	90,476
5. State Home Delivered Meals		133,769	133,769
8. Fed. Title III-D (Prev. Health)	8,794		8,794
9. Federal Title III-E (NFCSP)	53,400		53,400
10. Federal Title VII-A	-		-
10. Federal Title VII-EAP	-		-
11. State Access	7,989		7,989
12. State In-Home	142,442		142,442
13. State Alternative Care	31,465		31,465
14. State Care Management	80,228		80,228
15. St. ANS	12,458		12,458
16. St. Nursing Home Ombs (NHO)	-		-
17. Local Match			
a. Cash	252,550	39,000	291,550
b. In-Kind	15,000	38,000	53,000
18. State Respite Care (Escheat)	41,195		41,195
19. MATF	33,412		33,412
19. St. CG Support	4,123		4,123
20. TCM/Medicaid & MSO	55,000		55,000
21. NSIP		138,710	138,710
22. Program Income	85,700	272,700	358,400
TOTAL:	972,726	813,937	1,786,663

ADMINISTRATION				
Revenues	Local Cash	Local In-Kind	Total	
Federal Administration	44,472	35,902	15,000	95,374
State Administration	7,681			7,681
MATF Administration	3,304	-	-	3,304
St. CG Support Administration	407	-	-	407
Other Admin	97,800			97,800
Total AIP Admin:	153,664	35,902	15,000	204,566

Expenditures		
	FTEs	
1. Salaries/Wages	5.30	162,866
2. Fringe Benefits		31,200
3. Office Operations		10,500
Total:		204,566

Cash Match Detail		In-Kind Match Detail	
Source	Amount	Source	Amount
Branch County	15,515	Local Appropriation	15,000
St. Joseph County	20,387		
Total:	35,902	Total:	15,000

I certify that I am authorized to sign on behalf of the Area Agency on Aging. This budget represents necessary costs for implementation of the Area Plan. Adequate documentation and records will be maintained to support required program expenditures.

Signature

Title

Date

FY 2020 AREA AGENCY GRANT FUNDS - SUPPORT SERVICES DETAIL

Agency: Branch-St. Joseph Area Agency
 PSA: 3C

Budget Period: 10/01/19 to 09/30/20
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*Operating Standards For AAA's

Op Std	SERVICE CATEGORY	Title III-B	Title III-D	Title III - E	Title VII A OMB Title VII/EAP	State Access	State In-Home	St. Alt. Care	State Care Mgmt	State NHO	St. ANS	St. Respite (Escheat)	MATF	St. CG Supp	TCM-Medicaid MSO Fund	Program Income	Cash Match	In-Kind Match	TOTAL
A	Access Services																		
A-1	Care Management	27,500		25,000					80,228		12,458				55,000			6,000	206,186
A-2	Case Coord/supp			5,000		7,989											40,000		52,989
A-3	Disaster Advocacy & Outreach Program																		-
A-4	Information & Assis	20,000		2,000														3,000	25,000
A-5	Outreach																		-
A-6	Transportation	30,000		6,000								9,000				20,000	26,000		91,000
A-7	Options Counseling																		-
B	In-Home																		
B-1	Chore	6,200														500	2,650		9,350
B-2	Home Care Assis	10,000					110,242	31,465								38,500	102,000		292,207
B-3	Home Injury Cntrl																		-
B-4	Homemaking																		-
B-6	Home Health Aide																		-
B-7	Medication Mgt						8,200												8,200
B-8	Personal Care																		-
B-9	Assistive Device&Tech						8,000												8,000
B-10	Respite Care						16,000					20,000	5,412			5,200	18,000		64,612
B-11	Friendly Reassure	4,600															1,500		6,100
C-10	Legal Assistance	9,750														200	1,400		11,350
C	Community Services																		
C-1	Adult Day Services											21,195	19,000	4,123		20,000	30,000		94,318
C-2	Dementia ADC																		-
C-6	Disease Prevent/Health Promtion		8,794													250	2,500		11,544
C-7	Health Screening																		-
C-8	Assist to Hearing Impaired & Deaf Cmty																		-
C-9	Home Repair	6,000														500	3,500		10,000
C-11	LTC Ombudsman	2,000															13,000		15,000
C-12	Sr Ctr Operations																		-
C-13	Sr Ctr Staffing																		-
C-14	Vision Services																		-
C-15	Prevnt of Elder Abuse,Neglect,Exploitation																		-
C-16	Counseling Services	5,500														100	1,500		7,100
C-17	Creat.Conf.CG@ CCC																		-
C-18	Caregiver Supplmt Services																		-
C-19	Kinship Support Services			4,000												250	2,500		6,750
C-20	Caregiver E,S,T			11,400												200	8,000		19,600
*C-8	Program Develop	22,620																6,000	28,620
	Region Specific																		
	a. CommunityLivingProgServices	4,800																	4,800
	b.																		-
	c.																		-
	d.																		-
	7. CLP/ADRC Services																		-
Sp Co	8. MATF Adm											3,304							3,304
Sp Co	9. St CG Sup Adm													407					407
	SUPPRT SERV TOTAL	148,970	8,794	53,400	-	7,989	142,442	31,465	80,228	-	12,458	41,195	36,716	4,530	55,000	85,700	252,550	15,000	976,437

FY 2020 NUTRITION / OMBUDSMAN / RESPITE / KINSHIP - PROGRAM BUDGET DETAIL

Rev. 03/25/2019

Agency: Branch-St. Joseph Area Agency on Aging Budget Period: 10/01/19 to 9/30/20
 PSA: 3C Date: 05/13/19 Rev. Number original

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FY 2020 AREA PLAN GRANT BUDGET - TITLE III-C NUTRITION SERVICES DETAIL

Op Std	SERVICE CATEGORY	Title III C-1	Title III C-2	State Congregate	State HDM	NSIP Title III-E	Program Income	Cash Match	In-Kind Match	TOTAL
	Nutrition Services									
C-3	Congregate Meals	97,656		2,676		69,355	160,000	15,000	8,000	352,687
B-5	Home Delivered Meals		90,476		133,769	69,355	112,700	24,000	30,000	460,300
C-4	Nutrition Counseling									-
C-5	Nutrition Education									-
	AAA RD/Nutritionist*	950								950
	Nutrition Services Total	98,606	90,476	2,676	133,769	138,710	272,700	39,000	38,000	813,937

*Registered Dietitian, Nutritionist or individual with comparable certification, as approved by AASA.

FY 2020 AREA PLAN GRANT BUDGET-TITLE VII LTC OMBUDSMAN DETAIL

Op Std	SERVICE CATEGORY	Title III-B	Title VII-A	Title VII-EAP	State NHO	MSO Fund	Program Income	Cash Match	In-Kind Match	TOTAL
	LTC Ombudsman Ser									
C-11	LTC Ombudsman	2,000	-		-	-	-	13,000	-	15,000
C-15	Elder Abuse Prevention	-		-			-	-	-	-
	Region Specific	-	-		-		-	-	-	-
	LTC Ombudsman Ser Total	2,000	-	-	-	-	-	13,000	-	15,000

FY 2020 AREA PLAN GRANT BUDGET- RESPITE SERVICE DETAIL

Op Std	SERVICES PROVIDED AS A FORM OF RESPITE CARE	Title III-B	Title III-E	State Alt Care	State Escheats	State In-Home	Merit Award Trust Fund	Program Income	Cash/In-Kind Match	TOTAL
B-1	Chore									-
B-4	Homemaking									-
B-2	Home Care Assistance									-
B-6	Home Health Aide									-
B-10	Meal Preparation/HDM									-
B-8	Personal Care									-
	Respite Service Total	-	-	-	-	-	-	-	-	-

FY 2020 AREA PLAN GRANT BUDGET-TITLE E- KINSHIP SERVICES DETAIL

Op Std	SERVICE CATEGORY	Title III-B	Title III-E				Program Income	Cash Match	In-Kind Match	TOTAL
	Kinship Ser. Amounts Only									
C-18	Caregiver Sup. Services	-					-		-	-
C-19	Kinship Support Services	-	4,000				250	2,500	-	6,750
C-20	Caregiver E,S,T	-	-				-	-	-	-
	Kinship Services Total	-	4,000				250	2,500	-	6,750

Planned Services Summary Page for FY 2020

PSA: 3C

Service	Budgeted Funds	Percent of the Total	Method of Provision		
			Purchased	Contract	Direct
ACCESS SERVICES					
Care Management	\$ 206,186	11.52%	x		x
Case Coordination & Support	\$ 52,989	2.96%		x	
Disaster Advocacy & Outreach Program	\$ -	0.00%			
Information & Assistance	\$ 25,000	1.40%			x
Outreach	\$ -	0.00%			
Transportation	\$ 91,000	5.08%		x	
Option Counseling	\$ -	0.00%			
IN-HOME SERVICES					
Chore	\$ 9,350	0.52%		x	
Home Care Assistance	\$ 292,207	16.32%		x	
Home Injury Control	\$ -	0.00%			
Homemaking	\$ -	0.00%	x		
Home Delivered Meals	\$ 460,300	25.71%		x	
Home Health Aide	\$ -	0.00%			
Medication Management	\$ 8,200	0.46%	x		
Personal Care	\$ -	0.00%	x		
Personal Emergency Response System	\$ 8,000	0.45%	x		
Respite Care	\$ 64,612	3.61%	x	x	
Friendly Reassurance	\$ 6,100	0.34%		x	
COMMUNITY SERVICES					
Adult Day Services	\$ 94,318	5.27%		x	
Dementia Adult Day Care	\$ -	0.00%			
Congregate Meals	\$ 352,687	19.70%		x	
Nutrition Counseling	\$ -	0.00%			
Nutrition Education	\$ -	0.00%			
Disease Prevention/Health Promotion	\$ 11,544	0.64%		x	
Health Screening	\$ -	0.00%			
Assistance to the Hearing Impaired & Deaf	\$ -	0.00%			
Home Repair	\$ 10,000	0.56%		x	
Legal Assistance	\$ 11,350	0.63%		x	
Long Term Care Ombudsman/Advocacy	\$ 15,000	0.84%		x	
Senior Center Operations	\$ -	0.00%			
Senior Center Staffing	\$ -	0.00%			
Vision Services	\$ -	0.00%			
Programs for Prevention of Elder Abuse,	\$ -	0.00%			
Counseling Services	\$ 7,100	0.40%		x	
Creating Confident Caregivers® (CCC)	\$ -	0.00%			
Caregiver Supplemental Services	\$ -	0.00%			
Kinship Support Services	\$ 6,750	0.38%		x	
Caregiver Education, Support, & Training	\$ 19,600	1.09%		x	
AAA RD/Nutritionist	\$ 950	0.05%		x	
PROGRAM DEVELOPMENT	\$ 28,620	1.60%			x
REGION-SPECIFIC					
a. CommunityLivingProgServices	\$ 4,800	0.27%			
b.	\$ -	0.00%			
c.	\$ -	0.00%			
d.	\$ -	0.00%			
CLP/ADRC SERVICES	\$ -	0.00%	x		
SUBTOTAL SERVICES					
	\$ 1,786,663				
MATF & ST CG ADMINISTRATION					
	\$ 3,711	0.21%			x
TOTAL PERCENT		100.00%	5.84%	86.59%	7.57%
TOTAL FUNDING		\$ 1,790,374	\$104,512	\$1,550,288	\$135,574

Note: Rounding variances may occur between the Budgeted Funds column total and the Total Funding under the Method of Provision columns due to percentages in the formula. Rounding variances of + or (-) \$1 are not considered material.

FY 2020 BUDGET REVIEW SPREADSHEET

Rev. 03/25/2019

Agency:	Branch-St. Joseph	3C		Fiscal Year:	FY 2020
Date of SGA:	3/22/2019	SGA No.	CostAllocPlan	Date Reviewed by AASA:	
Date of Budget:	05/13/19	Revision No.	original	Initials of Field Rep Approving:	
SGA CATEGORY	SGA AWARD	C/O AMOUNT	TOTAL	AAA COMMENTS	
Title III Administration	\$ 44,472		\$ 44,472		
State Administration	\$ 7,681		\$ 7,681		
Title III-B Services	\$ 148,970		\$ 148,970		Transfer request (See Appendix F)
Title III-C-1 Services	\$ 98,606		\$ 98,606		From (-) Title III C1 -\$50,000
Title III-C-2 Services	\$ 90,476		\$ 90,476		To Title III C2 +\$15,000
Federal Title III-D (Prev. Health)	\$ 8,794		\$ 8,794		To Title III B +\$35,000
Title III-E Services (NFCSP)	\$ 53,400		\$ 53,400		
Title VII/A Services (LTC Ombuds)	\$ -		\$ -		
Title VII/EAP Services	\$ -		\$ -		
St. Access	\$ 7,989		\$ 7,989		
St. In Home	\$ 142,442		\$ 142,442		
St. Congregate Meals	\$ 2,676		\$ 2,676		
St. Home Delivered Meals	\$ 133,769		\$ 133,769		
St. Alternative Care	\$ 31,465		\$ 31,465		
St. Aging Network Srv. (St. ANS)	\$ 12,458		\$ 12,458		
St. Respite Care (Escheats)	\$ 41,195		\$ 41,195		
Merit Award Trust Fund (MATF)	\$ 36,716		\$ 36,716		
St. Caregiver Support (St. CG Sup.)	\$ 4,530		\$ 4,530		
St. Nursing Home Ombuds (NHO)	\$ -		\$ -		
MSO Fund-LTC Ombudsman	\$ -		\$ -		
St. Care Mgt.	\$ 80,228		\$ 80,228		
NSIP	\$ 138,710		\$ 138,710		
			\$ -		
SGA TOTALS:	\$ 1,084,577	\$ -	\$ 1,084,577		
Administrative Match Requirements					
ADMINISTRATION	BUDGET	SGA	DIFFERENCE	Minimum federal administration match amount	\$14,824
Federal Administration	\$ 44,472	\$ 44,472	\$ -	Administration match expended (State Adm. + Local Match)	\$58,583
State Administration	\$ 7,681	\$ 7,681	\$ -	Is the federal administration matched at a minimum 25%?	Yes
				Does federal administration budget equal SGA?	Yes
Sub-Total:	\$ 52,153	\$ 52,153	\$ -	Does state administration budget equal SGA?	Yes
MATF	\$ 3,304				
ST CG Supp	\$ 407				
Local Administrative Match				Merit Award Trust Admin. & St. Caregiver Support Admin must be expended at or below 9% of	
Local Cash Match	\$ 35,902			Total Merit Award Trust Fund & St. Caregiver Support Admin. Funds budgeted:	8%
Local In-Kind Match	\$ 15,000			Is Merit Award Trust Fund & St CG Support Admin. budgeted at 9% or less?	Yes
Sub-Total:	\$ 50,902			Amount of MATF Funds budgeted on Adult Day Care	\$ 19,000
Other Admin	\$ 97,800			Is at least 50% of MATF budgeted on Adult Day Care services?	Yes
Total Administration:	\$ 204,566	\$ 204,566	\$ -	Title III-E Kinship Services Program Requirements	
SERVICES:	BUDGET	SGA	% BUDGETED	Are kinship services budgeted at > 5% of the AAA's Title III-E funding?	Yes
Federal Title III-B Services	\$ 148,970	\$ 148,970	100.0000%	Are kinship services budgeted at < 10% of the AAA's Title III-E funding?	Yes
Fed. Title III C-1 (Congregate)	\$ 98,606	\$ 98,606	100.0000%	[note: see TL #369 & TL#2007-141]	
State Congregate Nutrition	\$ 2,676	\$ 2,676	100.0000%	For Agencies required to budget a minimum of \$25,000 of Title III-E requirement met?	N/A
Federal C-2 (HDM)	\$ 90,476	\$ 90,476	100.0000%	Title III-B Long Term Care Ombudsman Maintenance of Effort Requirements	
State Home Delivered Meals	\$ 133,769	\$ 133,769	100.0000%	Amount required from Transmittal Letter #428. (see cell L 42)	\$1,372
Federal Title III-D (Prev. Health)	\$ 8,794	\$ 8,794	100.0000%	Budgeted amount Title III-B for LTC Ombudsman.	\$2,000
Federal Title III-E (NFCSP)	\$ 53,400	\$ 53,400	100.0000%	Is required maintenance of effort met?	Yes
St. Access	\$ 7,989	\$ 7,989	100.0000%		
St. In Home	\$ 142,442	\$ 142,442	100.0000%		
St. Alternative Care	\$ 31,465	\$ 31,465	100.0000%	Service Match Requirements	
St. Care Mgt.	\$ 80,228	\$ 80,228	100.0000%	Minimum service match amount required	\$90,599
State Nursing Home Ombs (NHO)	\$ -	\$ -	#DIV/0!	Service matched budgeted: (Local Cash + In-Kind)	\$344,550
St ANS	\$ 12,458	\$ 12,458	100.0000%	Is the service allotment matched at a minimum 10%?	Yes
Sub-Total:	\$ 811,273	\$ 811,273	100.0000%		
Local Service Match				Miscellaneous Budget Requirements / Constraints	
Local Cash Match	\$ 291,550			Amounts budgeted for OAA / AASA Priority Services:	
Local In-Kind Match	\$ 53,000			Access:	\$77,500
				In-Home:	\$20,800
				Legal:	\$9,750
Sub-Total:	\$ 344,550			Total Budgeted for Priority Services:	\$108,050
Title VII/A Services (LTC Ombuds)	\$ -	\$ -	#DIV/0!	Are Access Services budgeted at minimum 10% of Original ACL Title III-B	Yes
Title VII/EAP Services	\$ -	\$ -	#DIV/0!	Are In Home Services budgeted at minimum 10% of Original ACL Title III-B	Yes
NSIP	\$ 138,710	\$ 138,710	100.0000%	Are Legal Services budgeted at minimum 6.5% of Original ACL Title III-B	Yes
St. Respite Care (Escheats)	\$ 41,195	\$ 41,195	100.0000%	(Actual % of Legal)	6.54%
MATF	\$ 33,412	\$ 33,412	100.0000%		
St. CG Support	\$ 4,123	\$ 4,123	100.0000%	Title III-B award w/o carryover or Transfers in current SGA	\$148,970
MSO Fund-LTC Ombudsman	\$ -	\$ -	#DIV/0!	Amount budgeted for Program Development:	\$22,620
TCM-Medicaid / CM	\$ 55,000			% of Title III-B Program Development (must be 20% or less):	15.0%
Program Income	\$ 358,400			Is Program Development budgeted at 20% or less?	Yes
				Title III-D allotment with carryover:	\$8,794
Total Services:	\$ 1,786,663			Amount budgeted for EBDP Activities, per TL#2012-244:	\$8,794
Grand Total: Ser.+ Admin.	\$ 1,991,229			Is 100% of Title III-D budgeted on APPROVED EBDP?	Yes

PRIORITY SERVICE SECTION

Access Services	III-B Budget Amount
a. Care Management	\$27,500
b. Case Coord/supp	
c. Disaster Advocacy	\$0
d. Information & Assis	\$20,000
e. Outreach	\$0
f. Transportation	\$30,000
g. Options Counseling	\$0
Access Total:	\$77,500

(AAA Regional Access Service)

In Home Services	III-B Budget Amount
a. Chore	\$6,200
b. Home Care Assis	\$10,000
c. Home Injury Cntrl	
d. Homemaking	
e. Home Health Aide	\$0
f. Medication Mgt	
g. Personal Care	
h. Assistive Device&Tech	\$0
i. Respite Care	\$0
j. Friendly Reassure	\$4,600
In Home Services Total:	\$20,800

(AAA Regional In-Home Service)
(AAA Regional In-Home Service)

Kinship Services	III-E Budget Amount
1. Caregiver Supplmt - Kinship Amount Only	
2. Kinship Support	\$4,000
3. Caregiver E,S,T - Kinship Amount Only	\$0
	\$0
Kinship Services Total:	\$4,000

(Other Title III-E Kinship Service)
(Other Title III-E Kinship Service)

Title III-B Transfers reflected in SGA	Title III-B Award
Title III-B award w/o carryover in SGA	\$148,970
a. Amt. Transferred into Title III-B	
b. Amt. Transferred out of Title III-B	
AoA Title III-B Award Total:	\$148,970

(Use ONLY If SGA Reflects Transfers)

(Always Enter Positive Number)
(Always Enter Positive Number)

NOTE: AoA Title III Part B award for the current FY means total award from AoA without carryover or transfers.

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #1**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: Care Management

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries	23,550		58,000		16,300		16,500	114,350
Fringe Benefits	3,250		4,686		2,500		2,500	12,936
Travel	2,500				1,252		1,000	4,752
Training	1,500				850			2,350
Supplies	1,200				500			1,700
Occupancy	1,250				500			1,750
Communications	1,000							1,000
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)	18,250		30,000		14,000		35,000	97,250
								0
Totals	52,500	0	92,686	0	35,902	0	55,000	236,088

SERVICE AREA: Branch & St. Joseph Counties

(List by County/City if service area is not entire PSA)

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes ~~XX~~ No

If yes, please describe:

SCHEDULE OF MATCH & OTHER RESOURCES #1

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
County Appropriations	35,902				
Medicaid Targeted Case Management			55,000		
Totals	35,902	0	55,000	0	

Difference

0

0

0

OK

OK

OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #2**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: Information & Assistance

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries	20,000					3,000		23,000
Fringe Benefits	2,000							2,000
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	22,000	0	0	0	0	3,000	0	25,000

SERVICE AREA: Branch & St. Joseph Counties

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes ~~XX~~ No

If yes, please describe: _____

Explanation for Other Expenses: _____

SCHEDULE OF MATCH & OTHER RESOURCES #2 FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Local Appropriation		3,000			
Totals	0	3,000	0	0	

Difference 0 0 0 0

OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #3**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES #3

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0

OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #4**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES #4

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0
 OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #5**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY 2014 AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES #5

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0
 OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #6**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES #6

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference

OK

OK

OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #7**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0
OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #8**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0
OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #9**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0

OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #10**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA)

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY 2014 AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference

OK

OK

OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #11**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0
 OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #12**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA)

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0
 OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #13**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference

OK

0

OK

0

OK

0

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #14**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0 0 0

OK OK OK

**FY 2020 Annual Implementation Plan
Direct Service Budget Detail #15**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2020

SERVICE: _____

LINE ITEM	Federal OAA Title III Funds	Other Fed Funds (non-Title III)	State Funds	Program Income	Match		Other Resources	Total Budgeted
					Cash	In-Kind		
Wages/Salaries								0
Fringe Benefits								0
Travel								0
Training								0
Supplies								0
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	0	0	0	0	0	0	0	0

SERVICE AREA: _____

(List by County/City if service area is not entire PSA) _____

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY 2014 AIP? Yes No

If yes, please describe: _____

SCHEDULE OF MATCH & OTHER RESOURCES

FY 2020

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Totals	0	0	0	0	

Difference 0 0 0 0
OK OK OK

COMMUNITY SERVICES

Op Std	Community Services	Federal Funds				State Funds						
		Title III-B	Title III-D **	Title III-E	Title VIIA -----	St. Nursing	St. Alternative	St. Respite Care	MI State Ombuds	St. Merit Award	St. Caregiver	St. Aging Network
C-1	Adult Day Service	X		X			X	X		X	X	X
C-2	Dementia Adult Day Care	X		X			X	X		X	X	X
C-6	Disease Prevention/Health Promotion	X	X	X								
C-7	Health Screening	X										
C-8	Assistance to Hearing Impaired & Deaf	X										
C-9	Home Repair	X										
C-10	Legal Assistance	X		X								
C-11	Long Term Care Ombudsman	X			Title VII A X	X			X			
C-12	Senior Center Operations	X										
C-13	Senior Center Staffing	X										
C-14	Vision Services	X										
C-15	Prevention of Elder Abuse, Neglect & Exploitation	X			Title VII A & EAP							
C-16	Counseling Services	X		X								
C-17	Creating Confident Caregivers® (CCC).	X	X	X								
C-18	Caregiver Supplemental Services	X		X								
C-19	Kinship Support Services	X		X								
C-20	Caregiver Education, Support & Training	X		X								

NUTRITION SERVICES

Op Std	Nutrition Service	Title III-C1 & State Congregate	Title III-C2 & State Home Delivered Meals	Title III-E	*NSIP
C-3	Congregate Meals	X			X
B-5	Home Delivered Meals		X	X	X
C-4	Nutrition Counseling	X	X	X	
C-5	Nutrition Education	X	X	X	

Requirements from AASA Transmittal letters that establish Fundable Service Categories
 Replaces: TL 367, 2005-102 & 2007-142
 See TL343 & TL2006-111 for guidance re St. MATF
 See TL 2012-244 for guidance re Title D
 See TL 2012-256 for guidance re St. ANS

*NSIP funds are designated for actual food costs for OAA Title III eligible meals

** Note for Title III D – All funds have to be used for Evidence-Based programs.
 TL #2019-384 Fundable Services Matrix, revised 2/15/2019, replaces TL #2015-301

Full Program Title Name

Title III Administration	Federal
State Administration	State
Title IIIB Supportive Services	Federal
Title IIIC-1 Services Congregate Meals	Federal
Title IIIC-2 Services Home Delivered Meals	Federal
Title IIID Services (Preventive Health)	Federal
Title IIIE Services (NFCSP) National Family Caregiver Support	Federal
Title VII/A Services (LTC Ombudsman)	Federal
Title VII/EAP Services Elder Abuse Prevention	Federal
State Access Services	State
State In-Home Services	State
State Congregate Meals	State
State Home Delivered Meals	State
State Alternative Care	State
State Aging Network Services (St. ANS)	State
State Caregiver Support	State
State Respite Care	State
State Merit Award Trust Fund (MATF)	State
State Nursing Home Ombs	State
Michigan State Ombudsman (MSO)	State
State Care Management	State
Nutrition Services Incentive Program (NSIP)	Federal

Program Title on SGA

Title III Administration
State Administration
Title IIIB Supportive Services
Title IIIC-1 Congregate Meals
Title IIIC-2 Home Delivered Meals
Title IIID Preventive Health
Title IIIE Natl. Family Caregiver
Title VII/A LTC Ombudsman
Title VII/EAP Eld Abuse Prevention
State Access Services
State In-Home Services
State Congregate Meals
State Home Delivered Meals
State Alternative Care
State Aging Network Services (St. ANS)
State Caregiver Support
State Respite Care
State Merit Award
State Nursing Home Ombs
Michigan State Ombudsman (MSO)
State Care Management
Nutrition Services Incentive Program (NSIP)

MATCHING REQUIREMENTS

Revision date 1/26/2016

Revision to Transmittal Letter #2016-320

FEDERAL ADMINISTRATION TOTAL - MATCH REQUIRED: 25%

STATE 15%^[2] (AASA)

LOCAL 10% (AAAs)

FEDERAL & STATE SERVICES TOTAL - MATCH REQUIRED: 15%

STATE 5% (AASA)

LOCAL 10% (AAAs)

Table 1 below describes these requirements by source of funds.

Table 1 AAA Local Matching Requirement by Fund Source

Funding Source	Fund Source Name	AAA Local Match Requirement	Reference
Federal	Title III Administration	15% (a)	OAA of 1965 (d)
Federal	Title IIIB Supportive Services	10%	OAA of 1965
Federal	Title IIIC-1 Congregate Meals	10%	OAA of 1965
Federal	Title IIIC-2 Home Delivered Meals	10%	OAA of 1965
Federal	Title IIID Preventive Health	10%	OAA of 1965
Federal	Title IIIE Natl. Family Caregiver	10%	OAA of 1965
Federal	Title VII/EAP Eld Abuse Prevention	No Match Required	ACL CFDA
Federal	Title VII/A LTC Ombudsman	No Match Required	AoA Fiscal Guide (b)
Federal	Nutrition Services Incentive Program	No Match Required	AoA Fiscal Guide
State	State Administration	No Match Required	AASA
State	State Access Services	10%	AASA
State	State In-Home Services	10%	AASA
State	State Congregate Meals	10%	AASA
State	State Home Delivered Meals	10%	AASA
State	State Nursing Home Ombudsman	10%	AASA
State	State Alternative Care	10%	AASA
State	MI State Ombudsman Funds (MSO)	10%	AASA
State	State Merit Award Trust Fund	No Match Required	AASA TL #1006 (7/28/09)
State	State Caregiver Support	10%	AASA
State	State Respite Care	No Match Required	Public Act 171 of 1990
State	State Care Management	10%	AASA
State	State Aging Network Services	10%	AASA

(a) 15% is an approximate amount and may vary slightly after applying the state match amount.

(b) AoA is the acronym for the federal Administration on Aging

(c) Michigan Office of Long Term Care Supports and Services (OLTCSS)

(d) OAA is the acronym for the Older Americans Act

Per AoA requirements, if the required non-federal share is not provided by the completion date of the funded project period, to meet the match percentage, AoA will reduce the Federal dollars awarded when closing out the award, which may result in a requirement to return Federal funds. AASA verifies compliance with local matching requirements based upon a review of AAA FSRs.

[2] The exact percentage amount may vary slightly in order to meet the federal requirement.