

***FFY 2005 - 2007
Area Plan on Aging
Contract Module***

INSTRUCTIONS

***For the Period
01/01/2005 through 12/31/2005***



Amended August 2004

FFY 2005 - 2007

AREA PLAN ON AGING CONTRACT MODULE INSTRUCTIONS

(PLEASE use only the forms provided with this package. Forms may not be modified. Updated Contract Module pages submitted with contract amendments, etc., must include the latest revision date on each page.)

Table of Contents *(Section 306(a), OAA – the plan shall be based on a uniform format established by the state agency)*

All pages of the Contract Module must be sequentially numbered and the location of each section must be listed in the Table of Contents.

Contract Module Certification Page *(Section 306(a)(6)(D), OAA – AAA must involve the advisory council in all matters relating to plan development, etc.)*

The Certification Page is to be completed as indicated and signed by the Board President or other authorized official, the Advisory Council chair and the AAA Executive Director. An updated Certification Page must be submitted with each revision to the Area Plan Contract Module.

Please Note: Spreadsheets C.I.A., C.I.B, C.I.F, C.I.G and C.II.B are linked. Use of the linked sheets is optional, but the AAAs must adhere to the format of the sheets. The AAAs are expected to submit the completed forms electronically. For the linked sheets, the color-coding has the following meaning:

- The purple fields are all calculated, therefore do not do any input in them.
- The yellow fields have to be input but will come directly from the contract budget page or funding tables.
- The light blue fields are direct input fields according to the AAA allocations.
- Only use as many county spreadsheets as are in your PSA (maximum 16).

Section C.I.A. Allocation to the Planning and Service Area *(Sections 306(a) and 307(a), OAA)*

All funds allocated to the PSA must be reflected as indicated on this form. **Note:** Please include the total sum for Title III-B services, and indicate by footnote the portion of this sum that is maintained by the AAA as Title III-B set aside. ***The Title III-B set aside currently approved by the Department cannot be increased.***

Section C.I.B. OAA Title III Priority Services Expenditures (*Sections 306(a)(2) and 307(a)(2)(C), OAA*)

Title III-B funds allocated to OAA priority services must meet or exceed the following percentages: access (20%), in-home (8%), and legal assistance (1%).

Sections C.I.C. Service Units and Costs Projections - Provider Summary (*Section 307(a), OAA*)

Information must be provided for each service provider under direct contract with the AAA. A separate form must be completed for each provider by county. The actual unit rate is what providers report as their actual costs to provide a unit of service. The adjusted unit rate is the negotiated unit rate (what the area agency agrees to pay for a unit of service). Services provided directly by the AAA must be reflected.

Section C.I.D. Service Units and Costs Projections - County Summary (*Section 307(a), OAA*)

The County Summary form will automatically roll up information from Section C.I.C. to display budget information and the average, high, low and median unit rates by county.

Section C.I.E. Service Units and Costs Projections - Planning and Service Area Summary (*Section 307(a), OAA*)

The Planning and Service Area Summary form will automatically roll up information from Section C.I.D. to display budget information and the average, high, low and median unit rates areawide.

Note: Sections C.I.C, C.I.D., and C.I.E. must be reported in the WebDB. Data entered in the WebDB must reconcile to contract amounts. A printout from the WebDB is to be submitted with the area plan. Other forms may not be used.

Section C.I.F. County Funding Profile (*Section 307(a), OAA*)

A separate form must be completed for each county in the planning and service area. Include only contracted dollars. Funds allocated to services provided directly by the AAA should be reported on the areawide summary form.

Section C.I.G. Areawide Funding Summary (*Section 307(a), OAA*)

Include all funds allocated to the PSA, including funds allocated to services administered directly by the AAA.

Section C.II.A. AAA Administration Budget (*Section 307(a), OAA*)

The AAA must complete a detailed operating budget and cost allocation plan that breaks out salaries and expenses by positions and funding sources on the form provided. ***ALL PAGES (1-6) MUST BE SUBMITTED WITH THE AREA PLAN.*** All the expenses of the agency must be reflected in the budget, with the portion **not** funded through the Department of Elder Affairs allocated to the "Other Projects, Non DOEA" column.

Section C.II.B. OAA Budget Summary *(Section 307(a), OAA)*

Please complete as indicated.

Section C.II.C. Financial and Compliance Audit Schedule *(Section*

307(a)(7)(A), OAA; Section I., paragraph L., Master Agreement)

Please complete as indicated.

Section C.III.A. Budget Narrative *(Section 307(a)(7), OAA)*

The area plans are expected to include a budget narrative that ties projected expenditures to the strategic program goals of the Administration on Aging and the planning priorities of the Department of Elder Affairs. In addition, the narrative must address the needs identified during the Area Agency's needs assessment analysis. Projected expenditures must be associated with meeting the needs of the elders receiving services within the planning and service area. The needs assessment data can also be used to justify shifting resources to address service gaps identified during needs assessment activities. Explanation should also be provided if unmet needs are identified and the Area Agency decides not to shift resources to address them.

See pages 3-5 and 9-10 in the Area Plan Program Module instructions for additional guidance on the needs assessment process, the AoA strategic goals, and the DOEA priorities.

Section C.III.B. Narrative on Effective Use of Resources *(Section 306(a)(1), OAA)*

This section should include a justification showing that services provided are cost-effective. The discussion might include the cost-savings as a result of targeting services to consumers at higher risk of nursing home placement; cost-effectiveness of early intervention, prevention and volunteer services; and showing the efficient use of administrative resources by comparing the amount of administrative budgets to total budgets managed.

Section C.IV.A. AAA Monitoring Plan *(Section I., paragraph N.2., Master Agreement)*

The plan must include the AAA's priorities for assuring effective service delivery and the achievement of established performance measures. It must also include monthly consumer visits and the review of a minimum of one percent (1%) of the PSA's consumer files to assure compliance with assessment and reporting requirements, and the appropriateness of services and consumer choices in the delivery of services. The AAA must address efforts to assure the integrity of data in CIRTS, and the use of CIRTS reports to monitor compliance with contractual and programmatic requirements. Results from consumer satisfaction surveys will be used by the AAA as part of the monitoring effort. Any problematic areas identified in the surveying will be addressed in the monitoring.

Section C.IV.B. AAA Monitoring Schedule (*Section I., paragraph N.2., Master Agreement*)

The form provided must display the AAA's schedule for conducting fiscal and programmatic monitoring of service providers.

Section C.V.A. Civil Rights Assurance (*Title VI of the Civil Rights Act of 1964, as amended*)

This assurance is to be completed and signed by the Board President or other authorized official.

Section C.V.B. Section 504 Assurance (*Section 504 of the Rehabilitation Act of 1973, as amended*)

This assurance is to be completed and signed by the Board President or other authorized official.

Section C.V.C. Availability of Documents Assurance (*Section 306, OAA*)

This assurance is to be completed and signed by the Board President or other authorized official.

Section C.VI. Contract Providers (*Sections 212 and 306(a)(13)(B)(i), OAA*)

Provide the name, address, telephone number, fax number, and contact person for each contract and subcontract provider. Identify the type of organization for each service provider contract and subcontract.

Section C.VII.A. AAA Board of Directors (*Ch. 617.0801, F.S.*)

Information is to be completed as indicated on the form.

Section C.VII.B. Meeting Schedule of AAA Board of Directors (*Ch. 617.0820, F.S.*)

Provide the 2005 meeting schedule for the AAA Board of Directors.

Section C.VIII.A. AAA Advisory Council Members (*Section 306(a)(6)(D), OAA*)

Information is to be completed as indicated on the form.

Section C.VIII.B. Meeting Schedule of AAA Advisory Council (*Section 306(a)(6)(D), OAA*)

Provide the 2005 meeting schedule for the AAA Advisory Council.

Section C.IX. Contract Module Review Checklist (*Section 306(a), OAA*)

Please complete the form provided by indicating whether each item is included in the area plan (Yes/No/Not Applicable) and identifying the area plan page number(s) where the items can be found.