

FY 2025 AREA PLAN GRANT BUDGET

Rev. 2/23/24

Agency: Branch-St. Joseph Area Agency on Aging

Budget Period: 10/01/24 to 09/30/25

PSA: 3C

Date: 04/05/24

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SERVICES SUMMARY			
FUND SOURCE	SUPPORTIVE SERVICES	NUTRITION SERVICES	TOTAL
1. Federal Title III-B Services	149,954		149,954
2. Fed. Title III-C1 (Congregate)		91,994	91,994
3. State Congregate Nutrition		2,523	2,523
4. Federal Title III-C2 (HDM)		127,204	127,204
5. State Home Delivered Meals		125,206	125,206
8. Fed. Title III-D (Prev. Health)	8,707		8,707
9. Federal Title III-E (NFCSP)	55,957		55,957
10. Federal Title VII-A	-		-
10. Federal Title VII-EAP	-		-
11. State Access	7,532		7,532
12. State In-Home	199,235		199,235
13. State Alternative Care	29,451		29,451
14. State Care Management	80,228		80,228
15. St. ANS	11,745		11,745
16. St. Nursing Home Ombs (NHO)	-		-
17. Local Match			
a. Cash	251,802	105,250	357,052
b. In-Kind	22,650	-	22,650
18. State Respite Care (Escheat)	31,512		31,512
19. MATF	31,501		31,501
19. St. CG Support	3,887		3,887
20. TCM/Medicaid & MSO	60,000		60,000
21. NSIP		121,695	121,695
22. Program Income	76,000	180,000	256,000
TOTAL:	1,020,161	753,872	1,774,033

ADMINISTRATION				
Revenues		Local Cash	Local In-Kind	Total
Federal Administration	48,202	35,902	25,000	109,104
State Administration	8,371			8,371
MATF Administration	3,115	-	-	3,115
St. CG Support Administration	384	-	-	384
Other Admin	96,800			96,800
Total AIP Admin:	156,872	35,902	25,000	217,774

Expenditures		
	FTEs	
1. Salaries/Wages	5.00	178,400
2. Fringe Benefits		35,600
3. Office Operations		3,774
Total:		217,774

Cash Match Detail		In-Kind Match Detail	
Source	Amount	Source	Amount
Branch County	15,515	Local Appropriation	25,000
St. Joseph County	20,387		-
	-		-
	-		-
	-		-
	-		-
	-		-
Total:	35,902	Total:	25,000

This budget represents necessary costs for implementation of the Area Plan.
Adequate documentation and records will be maintained to support required program expenditures.

FY 2025 AREA AGENCY GRANT FUNDS - SUPPORT SERVICES DETAIL

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

Budget Period: 10/01/24 to 09/30/25
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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 Title VII/EAP	OMB	State Access	State In-Home	St. Alt. Care	State Care Mgmt	State NHO	St. ANS	St. Respite (Escheat)	MATF	St. CG Suppt	TUM/Medicaid MSO Fund	Program Income	Cash Match	In-Kind Match	TOTAL
A	Access Services																			
A-1	Care Management	44,954							80,228			11,745				60,000		35,902	10,000	242,829
A-2	Case Coordination/Support			7,000			7,532											15,000		29,532
A-3	Disaster Advocacy & Outreach Program																			-
A-4	Information & Assistance			25,057															5,000	30,057
A-5	Outreach																			-
A-6	Transportation	30,000		7,000										8,000			22,000	28,000		95,000
A-7	Options Counseling																			-
A-8	Care Transition Coordination and Support																			-
B	In-Home																			
B-1	Chore	10,000															500	2,500		13,000
B-2	Home Care Assistance																			-
B-3	Home Injury Control																			-
B-4	Homemaking							92,110	14,725								16,500	40,000		163,335
B-6	Home Health Aide																			-
B-7	Medication Management							9,300												9,300
B-8	Personal Care							70,000	14,726								16,000	45,000		145,726
B-9	Assistive Device & Technology							10,000												10,000
B-10	Respite Care							17,825					12,812	5,016			4,000	18,000		57,653
B-11	Friendly Reassurance	10,000																600	1,500	12,100
C	Community Services																			
C-1	Adult Day Services												18,700	18,485	3,887		15,000	31,000		87,072
C-6	Disease Prevention/Health Promotion		8,707														500	2,500		11,707
C-7	Health Screening																			-
C-8	Assistance to Hearing Impaired & Deaf Community																			-
C-9	Home Repair	6,500															500	3,500		10,500
C-10	Legal Assistance	13,000															500	1,800		15,300
C-11	LTC Ombudsman	2,000																18,000		20,000
C-12	Senior Center Operations																			-
C-13	Senior Center Staffing																			-
C-14	Vision Services																			-
C-15	Programs for Prevention of Elder Abuse, Neglect, Exploitation																			-
C-16	Counseling Services																			-
C-18	Caregiver Supplement Services																			-
C-19	Kinship Support Services																			-
C-21	Caregiver Education			8,400													500	10,000		18,900
C-22	Caregiver Training			500																500
C-23	Caregiver Support Groups			8,000																8,000
*C-8	Program Development	23,000																		4,000
	Region Specific																			
	Community Living Program Services	5,000																	1,500	6,500
	Gap Filling	5,500																	650	6,150
	c.																			-
	d.																			-
	e.																			-
	f.																			-
Sp Co	8. MATF Adm													3,115						3,115
Sp Co	9. St CG Sup Adm														384					384
	SUPPORT SERVICE TOTAL	149,954	8,707	55,957	-	-	7,532	199,235	29,451	80,228	-	11,745	31,512	34,616	4,271	60,000	76,000	251,802	22,650	1,023,660

FY 2025 NUTRITION / OMBUDSMAN / RESPITE / KINSHIP - PROGRAM BUDGET DETAIL

Rev. 2/23/24

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FY 2025 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	91,044		2,523				55,000	15,000		163,567
B-5	Home Delivered Meals		127,204		125,206	121,695		125,000	90,250		589,355
C-4	Nutrition Counseling										-
C-5	Nutrition Education										-
B-12	Carry-out Meal (COM)										-
	AAA RD/Nutritionist*	950									950
	Nutrition Services Total	91,994	127,204	2,523	125,206	121,695	-	180,000	105,250	-	753,872

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

FY 2025 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	-	-	-	-	-	18,000	-	20,000
C-15	Elder Abuse Prevention	-	-	-	-	-	-	-	-	-
	Region Specific	-	-	-	-	-	-	-	-	-
	LTC Ombudsman Ser Total	2,000	-	-	-	-	-	18,000	-	20,000

FY 2025 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 2025 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	-	-				-	-	-	-
C-21	Caregiver Education	-	2,500				-	-	-	2,500
C-22	Caregiver Training	-					-	-	-	-
C-23	Caregiver Support Groups	-	2,500				-	-	-	2,500
	Kinship Services Total	-	2,500				-	-	-	2,500

Planned Services Summary Page for FY 2025			PSA: 3C			
Service	Budgeted Funds	Percent of the Total	Method of Provision			
			Purchased	Contract	Direct	
ACCESS SERVICES						
Care Management	\$ 242,829	13.66%	x		x	
Case Coordination & Support	\$ 29,532	1.66%		x		
Disaster Advocacy & Outreach Program	\$ -	0.00%				
Information & Assistance	\$ 30,057	1.69%			x	
Outreach	\$ -	0.00%				
Transportation	\$ 95,000	5.34%		x		
Option Counseling	\$ -	0.00%				
Care Transition Coordination and Support	\$ -	0.00%				
IN-HOME SERVICES						
Chore	\$ 13,000	0.73%		x		
Home Care Assistance	\$ -	0.00%				
Home Injury Control	\$ -	0.00%				
Homemaking	\$ 163,335	9.19%	x	x		
Home Delivered Meals	\$ 589,355	33.16%		x		
Home Health Aide	\$ -	0.00%				
Medication Management	\$ 9,300	0.52%	x			
Personal Care	\$ 145,726	8.20%	x	x		
Personal Emergency Response System	\$ 10,000	0.56%	x			
Respite Care	\$ 57,653	3.24%	x	x		
Friendly Reassurance	\$ 12,100	0.68%		x	x	
COMMUNITY SERVICES						
Adult Day Services	\$ 87,072	4.90%	x	x		
Congregate Meals	\$ 163,567	9.20%		x		
Nutrition Counseling	\$ -	0.00%				
Nutrition Education	\$ -	0.00%				
Disease Prevention/Health Promotion	\$ 11,707	0.66%		x		
Health Screening	\$ -	0.00%				
Assistance to the Hearing Impaired & Deaf Community	\$ -	0.00%				
Home Repair	\$ 10,500	0.59%		x		
Legal Assistance	\$ 15,300	0.86%		x		
Long Term Care Ombudsman/Advocacy	\$ 20,000	1.13%		x		
Senior Center Operations	\$ -	0.00%				
Senior Center Staffing	\$ -	0.00%				
Vision Services	\$ -	0.00%				
Programs for Prevention of Elder Abuse, Neglect, & Counseling Services	\$ -	0.00%				
Carry-Out Meal (COM)	\$ -	0.00%				
Caregiver Supplemental Services	\$ -	0.00%				
Kinship Support Services	\$ -	0.00%				
Caregiver Education	\$ 18,900	1.06%		x		
Caregiver Training	\$ 500	0.03%		x		
Caregiver Support Groups	\$ 8,000	0.45%		x		
AAA RD/Nutritionist	\$ 950	0.05%		x		
PROGRAM DEVELOPMENT	\$ 27,000	1.52%			x	
REGION-SPECIFIC						
Community Living Program Services	\$ 6,500	0.37%	x			
Gap Filling	\$ 6,150	0.35%	x	x		
c.	\$ -	0.00%				
d.	\$ -	0.00%				
e.	\$ -	0.00%				
f.	\$ -	0.00%				
SUBTOTAL SERVICES						
	\$ 1,774,033					
MATF & ST CG ADMINISTRATION						
	\$ 3,499	0.20%			x	
TOTAL PERCENT			100.00%	13.26%	78.59%	8.16%
TOTAL FUNDING		\$ 1,777,532		\$235,545	\$1,396,980	\$145,007

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 2025 BUDGET REVIEW SPREADSHEET

Rev. 2/23/24

Agency:	Branch-St. Joseph	3C		Fiscal Year:	FY 2025
Date of SGA:	Cost Allocation Plan	SGA No.	1/10/2024	Date Reviewed by AASA:	
Date of Budget:	04/05/24	Revision No.	Original	Initials of Field Rep Approving:	
SGA CATEGORY	SGA AWARD	C/O AMOUNT	TOTAL	AAA COMMENTS	
Title III Administration	\$ 48,202		\$ 48,202		
State Administration	\$ 8,371		\$ 8,371		
Title III-B Services	\$ 149,954		\$ 149,954	Transfer Request submitted (Appendix F) and reflected in corresponding "SGA AWARD" cell:	
Title III-C-1 Services	\$ 91,994		\$ 91,994	From Title III C1 (\$60,000)	
Title III-C-2 Services	\$ 127,204		\$ 127,204	To Title III C2 \$25,000	
Federal Title III-D (Prev. Health)	\$ 8,707		\$ 8,707	To Title III B \$35,000	
Title III-E Services (NFCSP)	\$ 55,957		\$ 55,957		
Title VII/A Services (LTC Ombuds)	\$ -		\$ -		
Title VII/EAP Services	\$ -		\$ -		
St. Access	\$ 7,532		\$ 7,532		
St. In Home	\$ 199,235		\$ 199,235		
St. Congregate Meals	\$ 2,523		\$ 2,523		
St. Home Delivered Meals	\$ 125,206		\$ 125,206		
St. Alternative Care	\$ 29,451		\$ 29,451	AASA COMMENTS	
St. Aging Network Srv. (St. ANS)	\$ 11,745		\$ 11,745		
St. Respite Care (Escheats)	\$ 31,512		\$ 31,512		
Merit Award Trust Fund (MATF)	\$ 34,616		\$ 34,616		
St. Caregiver Support (St. CG Sup.)	\$ 4,271		\$ 4,271		
St. Nursing Home Ombuds (NHO)	\$ -		\$ -		
MSO Fund-LTC Ombudsman	\$ -		\$ -		
St. Care Mgt.	\$ 80,228		\$ 80,228		
NSIP	\$ 121,695		\$ 121,695		
			\$ -		
SGA TOTALS:	\$ 1,138,403	\$ -	\$ 1,138,403		
Administrative Match Requirements					
ADMINISTRATION	BUDGET	SGA	DIFFERENCE		
Federal Administration	\$ 48,202	\$ 48,202	\$ -	Minimum federal administration match amount	\$16,067
State Administration	\$ 8,371	\$ 8,371	\$ -	Administration match expended (State Adm. + Local Match)	\$69,273
				Is the federal administration matched at a minimum 25%?	Yes
				Does federal administration budget equal SGA?	Yes
Sub-Total:	\$ 56,573	\$ 56,573	\$ -	Does state administration budget equal SGA?	Yes
MATF	\$ 3,115				
ST CG Supp	\$ 384				
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:	3115.009875
Local In-Kind Match	\$ 25,000			Is Merit Award Trust Fund & St CG Support Admin. budgeted at 9% or less?	Yes
Sub-Total:	\$ 60,902				
Other Admin	\$ 96,800				
		AIP TOT ADMIN	DIFFERENCE		
Total Administration:	\$ 217,774	\$ 217,774	\$ -	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	\$ 149,954	\$ 149,954	100.0000%		
Fed. Title III C-1 (Congregate)	\$ 91,994	\$ 91,994	100.0000%	[note: see TL #369 & TL#2007-141]	
State Congregate Nutrition	\$ 2,523	\$ 2,523	100.0000%	For Agencies required to budget a minimum of \$25,000 of Title III-E requirement met?	N/A
Federal C-2 (HDM)	\$ 127,204	\$ 127,204	100.0000%	Title III-B Long Term Care Ombudsman Maintenance of Effort Requirements	
State Home Delivered Meals	\$ 125,206	\$ 125,206	100.0000%	Amount required from Transmittal Letter #2020-431. (see cell L 42)	\$2,000
Federal Title III-D (Prev. Health)	\$ 8,707	\$ 8,707	100.0000%	Budgeted amount Title III-B for LTC Ombudsman.	\$2,000
Federal Title III-E (NFCSP)	\$ 55,957	\$ 55,957	100.0000%	Is required maintenance of effort met?	Yes
St. Access	\$ 7,532	\$ 7,532	100.0000%		
St. In Home	\$ 199,235	\$ 199,235	100.0000%		
St. Alternative Care	\$ 29,451	\$ 29,451	100.0000%	Service Match Requirements	
St. Care Mgt.	\$ 80,228	\$ 80,228	100.0000%	Minimum service match amount required	\$99,291
State Nursing Home Ombs (NHO)	\$ -	\$ -	#DIV/0!	Service matched budgeted: (Local Cash + In-Kind)	\$379,702
St ANS	\$ 11,745	\$ 11,745	100.0000%	Is the service allotment matched at a minimum 10%?	Yes
Sub-Total:	\$ 889,736	\$ 889,736	100.0000%		
Local Service Match				Miscellaneous Budget Requirements / Constraints	
Local Cash Match	\$ 357,052			Amounts budgeted for OAA / AASA Priority Services:	
Local In-Kind Match	\$ 22,650			Access:	\$74,954
				In-Home:	\$20,000
				Legal:	\$13,000
Sub-Total:	\$ 379,702			Total Budgeted for Priority Services:	\$107,954
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	\$ 121,695	\$ 121,695	100.0000%	Are Legal Services budgeted at minimum 6.5% of Original ACL Title III-B	Yes
St. Respite Care (Escheats)	\$ 31,512	\$ 31,512	100.0000%	(Actual % of Legal)	8.67%
MATF	\$ 31,501	\$ 31,501	100.0000%		
St. CG Support	\$ 3,887	\$ 3,887	100.0000%	Title III-B award w/o carryover or Transfers in current SGA	\$149,954
MSO Fund-LTC Ombudsman	\$ -	\$ -	#DIV/0!	Amount budgeted for Program Development:	\$23,000
TCM-Medicaid / CM	\$ 60,000			% of Title III-B Program Development (must be 20% or less):	15.3%
Program Income	\$ 256,000			Is Program Development budgeted at 20% or less?	Yes
				Title III-D allotment with carryover:	\$8,707
Total Services:	\$ 1,774,033			Amount budgeted for EBDP Activities, per TL#2012-244:	\$8,707
Grand Total: Ser.+ Admin.	\$ 1,991,807			Is 100% of Title III-D budgeted on APPROVED EBDP?	Yes

PRIORITY SERVICE SECTION

Access Services	III-B Budget Amount
a. Care Management	\$44,954
b. Case Coord/supp	\$0
c. Disaster Advocacy	\$0
d. Information & Assis	\$0
e. Outreach	\$0
f. Transportation	\$30,000
Access Total:	\$74,954

(AAA Regional Access Service)

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

(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	\$0
3. Caregiver Education - Kinship Amount Only	\$2,500
4. Caregiver Training - Kinship Amount Only	
5. Caregiver Support Groups - Kinship Amount Only	\$2,500
Kinship Services Total:	\$5,000

(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	\$149,954
a. Amt. Transferred into Title III-B	
b. Amt. Transferred out of Title III-B	
AoA Title III-B Award Total:	\$149,954

(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 2025 Annual Implementation Plan
Direct Service Budget Detail #1**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

SERVICE: Care Management (Community Living Prog.)

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	33,054		40,073		10,000	6,000	35,000	124,127
Fringe Benefits	5,700		4,500		1,500	3,000	10,000	24,700
Travel	2,000				1,000			3,000
Training					1,000			1,000
Supplies	200							200
Occupancy	1,500					1,000		2,500
Communications	1,500							1,500
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)	1,000		47,400		22,402		15,000	85,802
								0
Totals	44,954	0	91,973	0	35,902	10,000	60,000	242,829

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 X No

If yes, please describe:

SCHEDULE OF MATCH & OTHER RESOURCES #1

FY 2025

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
County Appropriation	35,902				
Local Resources		10,000			
Medicaid Targeted Care Management			60,000		
Totals	35,902	10,000	60,000	0	

Difference

0

0

0

OK

OK

OK

**FY 2025 Annual Implementation Plan
Direct Service Budget Detail #2**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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	23,057					5,000		28,057
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	25,057	0	0	0	0	5,000	0	30,057

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 X No

If yes, please describe:

Explanation for Other Expenses:

SCHEDULE OF MATCH & OTHER RESOURCES #2

FY 2025

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Local Resources		5,000			
Totals	0	5,000	0	0	

Difference 0 0 0 0
OK OK OK

**FY 2025 Annual Implementation Plan
Direct Service Budget Detail #3**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

SERVICE: Gap Filling

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						650		650
Fringe Benefits								0
Travel								0
Training								0
Supplies	2,500							2,500
Occupancy								0
Communications								0
Equipment								0
Other:								0
Service Costs								0
Purchased Services (CM only)								0
								0
Totals	2,500	0	0	0	0	650	0	3,150

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 No

If yes, please describe:

SCHEDULE OF MATCH & OTHER RESOURCES #3

FY 2025

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Local Resources		650			
Totals	0	650	0	0	

Difference

OK

0

OK

0

OK

0

**FY 2025 Annual Implementation Plan
Direct Service Budget Detail #4**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

SERVICE: Friendly Reassurance

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	4,000					850		4,850
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	4,000	0	0	0	0	850	0	4,850

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 X No

If yes, please describe:

SCHEDULE OF MATCH & OTHER RESOURCES #4

FY 2025

SOURCE OF FUNDS	MATCH		OTHER RESOURCES		Explanation for Other Expenses:
	VALUE		VALUE		
	Cash	In-Kind	Cash	In-Kind	
Local Resources		850			Insurance
Totals	0	850	0	0	

Difference

OK

OK

OK

**FY 2025 Annual Implementation Plan
Direct Service Budget Detail #5**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 #5

FY 2025

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 OK 0 OK 0 OK 0 OK

**FY 2025 Annual Implementation Plan
Direct Service Budget Detail #6**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 OK 0 OK 0 OK 0 OK

**FY 2025 Annual Implementation Plan
Direct Service Budget Detail #7**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #8**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #9**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #10**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #11**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #12**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #13**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #14**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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 2025 Annual Implementation Plan
Direct Service Budget Detail #15**

AAA: Branch-St. Joseph Area Agency on Aging

FISCAL YEAR: FY 2025

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 2025

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

Fundable Services Matrix - Updated attachment to TL #2024-499

ACCESS SERVICES

		Federal Funds				State Funds						
Operating Standard Service Number	Operating Standard Service Name	Title III-B Supportive Services	Title III-D Services (Preventive Health) **	Title III-E Services National Family Caregiver Support (NFCSP)	Title VIIA Services (Long-Term Care Ombudsman) and Title VII Elder Abuse Prevention (EAP)	State Access	State Care Management	State Respite Care (Escheats)	State In-Home	State Merit Award Trust Fund (MATF)	State Caregiver Support (St. CG Sup.)	State Aging Network Services (St. ANS)
A-1	Care Management	X		X		X	X					X
A-2	Case Coordination & Support	X		X		X	X					X
A-3	Disaster Advocacy & Outreach Program	X										
A-4	Information & Assistance	X		X		X						X
A-5	Outreach	X		X		X						X
A-6	Transportation (For MATF & St. CG Sup. only) - adult day service and respite related transport of service recipients including related medical and shopping assistance is allowed.	X		X						X	X	
A-7	Options Counseling	X		X		X	X					X
A-8	Care Transition Coordination and Support	X				X	X		X			

IN-HOME SERVICES

		Federal Funds				State Funds						
Operating Standard Service Number	Operating Standard Service Name	Title III-B Supportive Services	Title III-D Services (Preventive Health) **	Title III-E Services National Family Caregiver Support (NFCSP)	Title VIIA Services (Long-Term Care Ombudsman) and Title VII Elder Abuse Prevention (EAP)	State Access	State Alternate Care	State Respite Care (Escheats)	State In-Home	State Merit Award Trust Fund (MATF)	State Caregiver Support (St. CG Sup.)	State Aging Network Services (St. ANS)
B-1	Chore	X										
B-2	Home Care Assistance	X					X		X			X
B-3	Home Injury Control	X		X								
B-4	Homemaking	X					X		X			X
B-6	Home Health Aide	X					X		X			X
B-7	Medication Management	X					X		X			X
B-8	Personal Care	X					X		X			X
B-9	Assistive Devices & Technologies (PERS)	X		X			X		X			X
B-10	Respite Care (may also include chore, homemaking, home care assistance, home health aide, meal prep./HDM & personal care serv. as a form of respite care)	X		X			X	X	X	X	X	X
B-11	Friendly Reassurance	X										

COMMUNITY SERVICES

Operating Standard Service Number	Operating Standard Service Name	Federal Funds				State Funds						
		Title III-B Supportive Services	Title III-D Services (Preventive Health) **	Title III-E Services National Family Caregiver Support (NFCSP)	Title VIIA Services (Long-Term Care Ombudsman) and Title VII Elder Abuse Prevention (EAP)	State Nursing Home Ombudsman (NHO)	State Alternate Care	State Respite Care (Escheats)	MI State Ombudsman (MSO)	State Merit Award Trust Fund (MATF)	State Caregiver Support (St. CG Sup.)	State Aging Network Services (St. ANS)
C-1	Adult Day Service	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-18	Caregiver Supplemental Services	X		X								
C-19	Kinship Support Services	X		X								
C-21	Caregiver Education	X		X								
C-22	Caregiver Training	X		X								
C-23	Caregiver Support Groups	X		X								

NUTRITION SERVICES

Operating Standard Service Number	Operating Standard Service Name	Federal Funds				State Funds		Requirements from ACLS Bureau Transmittal Letters (TL) that establishes Fundable Service Categories Replaces: TL 367, 2005-102, and 2007-142 See TL 343 and TL2 006-111 for guidance re St. MATF See TL 2012-244 for guidance regarding Title III-D See TL 2012-256 for guidance regarding State Aging Network - Revised 7/26/17
		Title III-C1 Congregate	Title III-C2 Home Delivered Meals	Title III-E Services National Family Caregiver Support (NFCSP)	Nutrition Services Incentive Program *(NSIP)	State Congregate	State Home Delivered Meals	
C-3	Congregate Meals	X			X	X		
B-5	Home Delivered Meals		X	X	X		X	
C-4	Nutrition Counseling	X	X	X		X	X	
C-5	Nutrition Education	X	X	X		X	X	
B-12	Carry-Out Meal (COM)		X	X	X		X	

*NSIP funds are designated for actual food costs for Older Americans Act Title III eligible meals.

**Title III D - All Funds must be used for Evidence-Based programs.

Title III Administration
State Administration
Title IIIB Supportive Services
Title IIIC-1 Services Congregate Meals
Title IIIC-2 Services Home Delivered Meals
Title IIID Services (Preventive Health)
Title IIIE Services (NFCSP) National Family Caregiver Support
Title VII/A Services (LTC Ombudsman)
Title VII/EAP Services Elder Abuse Prevention
State Access Services
State In-Home Services
State Congregate Meals
State Home Delivered Meals
State Alternative Care

Federal
State
Federal
Federal
Federal
Federal
Federal
Federal
State
State
State
State
State

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 Trust Fund (MATF)
State Nursing Home Ombs
Michigan State Ombudsman (MSO)
State Care Management
Nutrition Services Incentive Program (NSIP)

State
State
State
State
State
State
State
Federal

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 2/2/2016

Revision to Transmittal Letter #2016-323

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 III-D Preventive Health	10%	OAA of 1965
Federal	Title III-E 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.