

DEPARTMENT OF AGING

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PROGRAM MEMO

TO: AREA AGENCIES ON AGING DIRECTORS	NO.: PM 05-13 (P)
SUBJECT: Instructions for Area Plan Year-End Report for Fiscal Year (FY) 2004-2005	DATE ISSUED: August 8, 2005
REVISED	EXPIRES: One Year from Date of Issuance
REFERENCES: PM 00-21 (P)	SUPERSEDES: PM 04-13 (P)
PROGRAMS AFFECTED: <input type="checkbox"/> All <input checked="" type="checkbox"/> Title III-B <input checked="" type="checkbox"/> Title III-C1/C2 <input checked="" type="checkbox"/> Title III-D <input checked="" type="checkbox"/> Title III-E <input checked="" type="checkbox"/> Title V <input checked="" type="checkbox"/> CBSP <input type="checkbox"/> MSSP <input checked="" type="checkbox"/> Title VII <input type="checkbox"/> ADHC <input checked="" type="checkbox"/> HICAP <input checked="" type="checkbox"/> Other: <u>AAA Administration</u>	
REASON FOR PROGRAM MEMO: <input type="checkbox"/> Change in Law or Regulation <input type="checkbox"/> Response to Inquiry <input checked="" type="checkbox"/> Other Specify: <u>Reporting Instructions</u>	
INQUIRIES SHOULD BE DIRECTED TO: Kathleen Hendrickson, Area Plan Team Lead, khendric@aging.ca.gov or Denny Wight, dwight@aging.ca.gov	

The purpose of this Program Memo (PM) is to convey to Area Agencies on Aging (AAA) instructions for preparing the Area Plan Year-End Report for the planning period covered by FY 2004-2005. The California Department of Aging (CDA) uses the Year-End Reports when reporting to federal and State officials on AAA activities, achievements, and significant barriers that must be addressed to achieve local goals. This final Year-End Report for the period covered by the 2001-2005 Area Plan, is due to CDA no later than September 30, 2005.

Overview

The Reference Guide for the 2001-2005 Area Plan development [PM 00-21 (P)] states that the purpose of the Year-End Report is to provide a retrospective account of progress made toward specified goals during the preceding FY. The Year-End Report provides a performance report for the community and CDA. It reaffirms the important role of AAAs as advocates, planners, and administrators of programs for seniors and adults with disabilities in their local Planning and Service Areas (PSA).

A Year-End Report may be used to inform the public about: (1) the AAA's key activities during the preceding year; (2) significant achievements during the preceding year; and (3) the difficulties the AAA has encountered in executing its charge. It is similar, in this respect, to a corporate annual report.



CDA has determined that the Year-End Report satisfies the following requirements of the Older Americans Act, Section 306 (a) (4) (A) (iii) (III):

“ . . . with respect to the fiscal year preceding the fiscal year for which such plan is prepared----provide information on the extent to which the area agency on aging met the objectives described...”

Format and Content

The format and content of the Area Plan Year-End Report is to follow the guidance provided in PM 00-21 (P), which is summarized below.

- The Year-End Report may be written using either narrative or objective-by-objective format.
- The final Year-End Report, submitted at the end of the four-year planning cycle, should include a discussion of the known impact of activities undertaken during the entire planning cycle. *(FY 2004-2005 is the final year of the four-year Area Plan.)*
- The Year-End Report should include a discussion of the objectives set for the preceding year which were completed, remain incomplete, and/or where changes to objectives were necessary. Circumstances, which affected progress toward specific goals resulting in revised objectives, should also be addressed.
- AAAs that expended any amount of funds for Program Development (PD) or Coordination (C) during the period covered by the Year-End Report must include an explanation of their PD or C accomplishments. The explanation should clearly indicate what objectives were achieved, deleted or extended into a future FY. Any accompanying narrative should clearly describe the reasons for deleting or extending particular objectives. The information regarding progress toward PD or C objectives will assist the Department in reviewing the costs claimed for PD or C in the Financial Closeout for the applicable FY.
- Content should be specific and identified by Goal/Objective number to allow for linking or cross-referencing with related objectives stated in the Area Plan.

Transmittal

- Send an original and one copy of the Year-End Report and Transmittal Letter to the new CDA address, which will be effective August 15, 2005:

**Kathleen Hendrickson, Area Plan Team Lead
California Department of Aging
1300 National Drive, Suite 200
Sacramento, California 95834**

- The Transmittal Letter must be dated and signed by the AAA Director, the Advisory Council Chair, and the Governing Board Chair. (See attached Transmittal Letter format.)
- The Area Plan Year-End Report for FY 2004-2005 is due to CDA no later than **September 30, 2005**. Normally the Year-End Report is due by August 31, but this one-time extension is being granted due to late transmission of Year-End Report requirements for FY 2004-2005 by CDA.

Looking ahead to the FY 2005-2006 Year-End Report, which will be due August 31, 2006:

- Instructions for preparing Year-End Reports for years associated with the 2005-2009 Area Plan are located in Part Three - Area Plan Maintenance in the "Reference Guide for Development of the 2005-2009 Area Plan."
- The Reference Guide, which is available on the CDA website, includes a chart of reporting requirements and due dates on page 51.

Area Plan Team

There have been changes in the Area Plan Team membership. Kathleen Hendrickson and Denny Wight now comprise the Area Plan Team, and their e-mail addresses are located in the heading of this PM. Telephone numbers for CDA staff will change with the move, so AAAs will be notified of the new numbers as soon as they are assigned.

((Original signed by Lora Connolly))

Lora Connolly
Acting Director

Attachment: Transmittal Letter Format

**Transmittal Letter Format
Year-End Report for Fiscal Year 2004-2005**

May be submitted on Area Agency on Aging (AAA) Letterhead.
Titles may be changed as appropriate for the AAA.

AAA Name _____

PSA Number _____

The Area Agency on Aging hereby submits to the California Department of Aging the Area Plan Year-End Report for Fiscal Year 2004-2005.

This Year-End Report provides a retrospective account of the progress made by the Area Agency on Aging toward completing Area Plan Goals and Objectives. As the final Year-End Report for the 2001-2005 planning period, this report includes a discussion of the known impact of activities undertaken during the entire planning cycle and the status of Objectives set for the proceeding year.

The undersigned recognize the responsibility within each community to monitor systems of care in the Planning and Service Area (PSA) that address the needs of older individuals, their families and caregivers.

1. **(Type Name)** _____

(Sign) _____
President, Governing Board

(date)

2. **(Type Name)** _____

(Sign) _____
Chair, Advisory Council

(date)

3. **(Type Name)** _____

(Sign) _____
Director, Area Agency on Aging

(date)