

AREA PLAN ALLOCATION METHODOLOGY

The purpose of this document is to outline the allocation methodology used to allocate Federal and State funds for the Area Plan (AP).

Baseline Allocations

Federal Titles III and VII Funding (Other than Ombudsman Program)

Local assistance funds from the Federal Title III and Title VII grant award are allocated based on the Intrastate Funding Formula (IFF) as follows:

- \$50,000 administrative base funding
- The remainder of federal funds are allocated based on weighted population factors consistent with federal requirements using the following data sources to determine the number of persons statewide and in each Planning and Service Area (PSA) with characteristics corresponding to each population factor:

Population Factors	Data Source	Weight
Non-Minority 60+	State and County Population Projections – Department of Finance	1.0
Minority 60+	State and County Population Projections – Department of Finance	2.0
Low Income 60+	American Community Survey - Administration for Community Living	2.0
Geographic Isolation 60+	Demographic and Housing Characteristics - United States Census Bureau	1.5
Medi-Cal Eligible 60+ (Title IIID Only)	Medi-Cal Certified Eligibles – Department of Health Care Services	1.0

State Funding (Other than Ombudsman Program)

Local assistance funds from the State General Fund (GF) are allocated as follows:

- First, allocated GF to match designated federal funds as mandated by federal regulations.
- Second, allocated the remaining GF for Maintenance of Effort to bring each Area Agency on Aging (AAA) to a funding level consistent with the previous year's total allocation for selected funds. Pursuant to Welfare and Institutions Code

Section 9112(c), CDA makes this Maintenance of Effort adjustment to the degree possible with available funds.

- Third, once the Maintenance of Effort is met, the remaining GF (Surplus Overmatch) is allocated using the Washington Formula to those AAA not adjusted for the Maintenance of Effort.

General Fund Baseline Administration Funding

Each Area Agency on Aging receives an additional local assistance baseline of \$100,000 that must be expended on administrative activities. This funding is tied to the Legislature's investment in Area Agencies on Aging and not tied to a specific Title III category.

Ombudsman Program Federal Funding

Local Ombudsman Programs receive a base allocation of \$100,000 pursuant to Welfare & Institutions Code (W&I) 9719.5. The base allocation is allocated from both General and Federal Funds.

General and Federal Funds are allocated as follows:

- \$100,000 in baseline funding to each local Ombudsman program proportionately from General Fund, Title III and Title VII (52.7%, 18.9% and 28.4% respectively).
- The remainder of the federal funds are allocated pursuant to W&I Section 9719.5 using the following factors which weights the PSA number of facilities, facility beds, and square miles:

Factor	Percentage
Number of Long-Term Care Facilities	50 percent
Number of Long-Term Care Beds	40 percent
Square Miles in the PSA	10 percent

Ombudsman Program State Funding

The General Fund, Skilled Nursing Facility Quality and Accountability Funds, and California Department of Public Health, Licensing and Certification Program Funds are allocated using the funding formula found in W&I Section 9719.5.

The funds from the State Health Facilities Citation Penalties Account are allocated based on the number of Skilled Nursing Facility Beds in each Ombudsman programs service area as specified in the Enacted Budget Act.

Nutrition Services Incentive Program (NSIP)

The NSIP funding is allocated based on the meal counts from the previous Federal Fiscal Years (FY) in proportion to the meals served statewide.

General Fund Nutrition Augmentation Funding

AAA's receive a base allocation of \$150,000 with the remaining funding allocated using the Washington Formula factors.

Additional Allocations

One-Time-Only (OTO) Federal Funds

Up to five percent of each AAA's unexpended Federal Funds from the previous AP contract are reallocated to the AAA. Unexpended amounts that exceed five percent are redistributed to all AAAs using the applicable Intrastate Funding Formula factors.

One-Time-Only (OTO) Special Funds

State Health Facilities Citation Penalties Account funds for the Ombudsman Program are allocated using each PSA's relative proportion of the State's total number of Skilled Nursing Facility Beds.

Federal Supplemental or Reduced Grant Funds

Any supplemental grant funding received or reductions in funding will be allocated using the applicable Intrastate Funding Formula Factors and will be reflected on the Budget Displays as Adjustments.