

# Financial Director Training



# Cost Sharing/Fee for Service Policy

The state policy is available on our website under “[Additional Program Guidance](#)”

The OAA permits fee for service/cost sharing for all services except: Care coordination, CRIA, congregate meals, home delivered meals, long-term care coordinating activity, public information & education, legal assistance elder abuse and ombudsman.

Couple of things to watch out for if you use OAA or any match funds.

- (1) Individuals in poverty can not be charged a fee
- (2) There can not be a minimum payment, e.g.: \$1 to ride the bus
- (3) Charge a flat fee, e.g.: \$10 to attend a senior center or adult day
- (4) Require proof of income (means test), e.g.: earnings statements.
- (5) Deny services based on income
- (6) Deny services for non-payment
- (7) Implement an alternative fee scale that has not been pre-approved by  
VDA

# Area Plan Requirements

By Contract AAAs are required to follow:

- Freedom of Information Act;
- Public Procurement Act;
- The State & Local Government Conflict of Interest Act;
- All subcontractors are required to adhere to VDA's Service Standards; and
- AAAs shall annually monitor activities their subcontractors.

# The AAA Service Dilemma

Services can be curtailed due to lack of funding

Coping Strategies:

- Limit the number of different services provided
- Limit number of people served (waiting lists)
- Limit where services are provided (some local governments pay for more meal sites than others)
- Target those most in need.

# Monitoring

Solomon will be monitoring.

Reviewing Board Chair and Executive Director Self-Assessments Results completed in December.

Exit Conference – CEO should attend, Board and Treasurer encouraged to attend.

Must change auditors every 5 years.

Audit Report must include opinion on:

- Fair presentation of financial statements
- Conformity to GAAP
- Schedule of Expenditures
- Current & prior year findings and results

OMB A-131 Supplement on Audit of the Aging Cluster - 11 page guidance.

[http://m.whitehouse.gov/sites/default/files/omb/assets/omb/circulars/a133\\_compliance/08/hhs.pdf](http://m.whitehouse.gov/sites/default/files/omb/assets/omb/circulars/a133_compliance/08/hhs.pdf)

# Additional Resources

More training is available on our Website

➤ [Area Plan for Aging](#)

➤ [Financial Management](#)

☐ [Financial Management Manual for AAAs](#)

➤ [AAA Leadership Guidance](#)

☐ **General Guidance:**

[Board & Advisory Council Handbook](#)

[Federal and State Laws and Regulations Impacting AAA's](#)

☐ **Sample Policies**

[Minimum Procurement Guidelines](#)

[Record Retention And Destruction - Sample Policy](#)

[Whistleblower and Non-Retaliation - Sample Policy](#)

# Any Questions?

