



Advancing independence and inclusion of older adults and people with disabilities

State Unit on Aging Directors Letter #01-2025

To: State Unit on Aging (SUA) Directors

From: Maura Calsyn, Principal Deputy Administrator performing the duties of the ACL Administrator and Assistant Secretary for Aging

Re: New State Plan Guidance and Additional Information

Date: January 13, 2025

Dear SUA Directors:

This letter provides updated guidance and supersedes SUA Directors Letter #01-2021 and all previous program instructions (PIs) on the same subject issued by the Administration on Aging (AoA). ACL has released updated [State Plan Guidance \(SPG\)](#), a [corrective action plan \(CAP\) template](#) and [instructions](#), and various financial forms for Older Americans Act (OAA) formula award implementation to support the administration, stewardship, and oversight of OAA formula awards.¹ The appendices to this letter provide SUAs with key due dates and links to newly issued information collection items.

On December 17, 2024, the Office of Management and Budget (OMB) approved a package of information collection items for AoA Formula Grant Program Management (OMB # 0985-0083). This collection included the SPG, CAP template and instructions, and various financial forms. The SPG serves as a required tool to help SUAs develop their next state plan or state plan amendment consistent with current OAA statutory and regulatory requirements. The CAP template and instructions provide information for grantees to request a CAP and document a plan for coming into compliance with federal requirements, when timely compliance is not feasible. The updated financial forms provide tools to assist SUAs in reporting financial information to ACL, including two new forms: the Title III Transfer Request form and Title III/VII Reallotment form. ACL is hopeful that the updated guidance, template, forms, and instructions will be beneficial to SUAs.

Prior PI guidance issued by AoA has been incorporated, as needed, in current regulations and information collection items. Therefore, all previous PIs issued by AoA are now superseded as

¹ In accordance with 5 Code of Federal Regulations (CFR) 1320.8(d), ACL published a 60-day notice in the Federal Register on October 18, 2023, with a comment period closing December 18, 2023, to solicit comments on the updated documents. On September 26, 2024, ACL then published a 30-day notice that closed October 28, 2024. The new SPG and forms and instructions received approval from OMB on December 17, 2024.

of January 13, 2025. Superseded PIs will be archived on <https://acl.gov/about-acl/administration-aging-program-instructions>

Please see the SPG and CAP template and instructions above. For financial forms and instructions, we encourage you to access the links found in Appendix A.

ACL provided training to the aging network in a webinar titled *State Plans on Aging, Area Plans on Aging, Intra- and Inter-state Funding Formulas* in June 2024. ACL also provided training on the new SPG and CAP supporting documents in October of 2024. Details and recordings of the trainings, slides, and other resources are included on ACL's www.acl.gov/OAArule website. We encourage you and your staff to review the training materials.

If you or your staff have questions, please [contact](#) your ACL Regional Administrator and/or ACL Grants Management Specialist.

Sincerely,



Maura Calsyn,
Principal Deputy Administrator performing the duties of the ACL Administrator and Assistant Secretary for Aging

cc: Kari Benson, Deputy Assistant Secretary for Aging, AoA
Amy Wiatr-Rodriguez, Director, Center for Regional Operations
Alice Kelsey, Deputy Director, AoA
Phantane Sprowls, Director, Office of Fiscal Operations
ACL Regional Administrators, Appendix C

Appendix A – Key Financial Reporting

Below is a summary of key financial reporting documents that SUAs should be aware of as well as new links to the related forms and instructions:

Title / Document	Due Date	Frequency	Reporting Method
Certification of Maintenance of Effort for Title III Form & Instructions	August 1, or next business day	Annual	Submit form to AoA.grants@acl.hhs.gov with a CC to the appropriate Regional Administrator.
Certification of Minimum Expenditures for Long-Term Care Ombudsman Program Form & Instructions	August 1, or next business day	Annual	Submit form to AoA.grants@acl.hhs.gov with a CC to the appropriate Regional Administrator.
Transfers Form & Instructions	August 1 or before, in the final year of the original two-year project period	As needed; Annual	Submit form to AoA.grants@acl.hhs.gov with a CC to the appropriate Regional Administrator.
Reallotment Form & Instructions	Second Friday in September	Annual	Submit form to AoA.grants@acl.hhs.gov with a CC to the appropriate Regional Administrator.
Title III Supplemental Form to Standard Form (SF)-425 & Instructions	For Annual Reports, no later than 90 days after the reporting period end date. For Final Reports: no later than 120 days after the project period end date, January 28	Annual	Submit form attachment to the Federal Financial Report submissions in the Payment Management System (PMS).

Appendix B – Key Program Reporting

Please also note the following key programmatic reporting deadlines:

Title / Document	Due Date	Frequency	Reporting Method
Title III, VII (Chapters 3 & 4)	January 31, or before	Annual	Submit online in Older Americans Act Performance System (OAAPS): <ul style="list-style-type: none">• State Program Report (SPR)• Nutrition Services Incentive Program (NSIP)
Ombudsman data	January 31, or before	Annual	Submit online in National Ombudsman Reporting System (NORS), within OAAPS.
NSIP data certified	February 28, or before	Annual	Certify online in OAAPS.

Appendix C – Regional Administrator and Grants Management Specialist Contacts

Program Contacts

Region	States	Name	Email
1	CT, MA, ME, NH, RI, VT	Jennifer Throwe	Jennifer.Throwe@acl.hhs.gov
2	NY, NJ, PR, VI (and PA for Region 3)	Rhonda Schwartz	Rhonda.Schwartz@acl.hhs.gov
3	DC, DE, MD, VA, WV	Stephanie Cole	Stephanie.Cole@acl.hhs.gov
4	AL, FL, GA, KY, MS, NC, SC, TN	Costas Miskis	Constantinos.Miskis@acl.hhs.gov
5	IL, IN, MI, MN, OH, WI	Lacey Boven	Lacey.Boven@acl.hhs.gov
6	AR, LA, OK, NM, TX	Derek Lee	Derek.Lee@acl.hhs.gov
7	IA, KS, MO, NE	Cynthia Brammeier	Cynthia.Brammeier@acl.hhs.gov
8	CO, MT, UT, WY, ND, SD	Percy Devine	Percy.Devine@acl.hhs.gov
9	CA, NV, AZ, HI, GU, CNMI, AS	Fay Gordon	Fay.Gordon@acl.hhs.gov
10	AK, ID, OR, WA	Louise Ryan	Louise.Ryan@acl.hhs.gov

Grants Management Specialist Contacts

Regions 1-4 & 10	Sherry Cochran	Sherry.Cochran@acl.hhs.gov
Regions 5-9	Brandon Copeland	Brandon.Copeland@acl.hhs.gov