

Funding Formula Factors & Carryovers

Funding Formula Factors

Required Funding Factors

Must include the following, per 45 CFR 1321.49

- Geographic distribution: share of older adults aged 60+ within each Planning and Service Area (PSA)
- Greatest economic need: concentration of low-income older adults in each area
- Greatest social need: includes factors such as rurality, minority status, and low-income
- III-D (disease prevention/health promotion): allocation targets medically underserved areas with high need

Workflow

- Collect and analyze PSA data: population, ethnicity, rurality, and medical need
- Apply weights to each factor and calculate each PSA's share of the federal and state dollars (pending receipt of awards)
- Assess and apply minimum funding thresholds (base)
- Issue equitable, data-driven, transparent allocations for budgeting the Area Plan services

2027 Funding Formula Factors

- Based on the 2018-2022 American Community Survey (ACS) Special Tabulation on Aging
- III-D calculations updated due the changes in Medically Underserved Areas (MUAs)
- Health Resources and Services Administration (HRSA)

- Washington, Montgomery, and Prince Edward County no longer classified as an MUA
- Highland County newly designated as an MUA

Data Elements

1. **2027 Formula:** This tab shows the final FFY2027 allocation percentage by PSA derived from the 2018-2022 ACS data. It lists each PSA's share or distribution of allocations based on demographic data.
2. **III-D Calculation:** This is the detailed breakdown of the evidence-based disease prevention and health promotion practices. It uses the same core factors and weights as the Intrastate Funding Formula and adds a Medically Underserved Area adjustment at the locality level.
3. **2022 ACS Formula:** This is the base (non-III-D) funding formula workbook. It applies the factor mix and weights and provides the PSA level rollups and resulting shares as well as itemizing the totals in each jurisdiction.
4. **Rural-Urban:** Tab documents rural status by jurisdiction, with square miles, total population, density (persons per square mile), and a Y/N flag for whether the locality is considered rural. A jurisdiction is treated as rural if it's not within a Metropolitan Service Area (MSA) or if its density is <50 people per square mile, aligning with Office of Management and Budget (OMB) Bulletin No. 23-01
5. **Edited Table:** The tab compares PSA totals to jurisdictional totals for key counts of population aged 60+, 60+ in poverty, and 60+ minority below poverty. It verifies the roll-ups are consistent with the raw jurisdiction data and that the PSA shares are correctly derived from the statewide totals.
6. **2022 Raw Data Tables:** This tab contains the underlying 2018-2022 ACS 5-year data used to compute factors at the jurisdiction and PSA levels. It confirms that PSA totals match jurisdiction totals and provides the counts used to calculate the weighted formula.
7. **Age Orig Table – VAS21003:** This is the ACS S21003 Age table (2018-2022) for Virginia and sub-geographies. It shows total population and age brackets (55-59, 60-64, 65-69, 70-74, 75-79, and

80+) with standard errors and supports the population 60+ values used throughout the spreadsheet.

8. Poverty & Minority Ori-VAS21040: This is the source for minority in poverty demographics used in the funding formula. The tab provides the jurisdictional level data that calculates the funding formula's 60+ minority below poverty factor.

Carryover for FFY 2026 Awards

Carryover Waived

- 10% of each award - waived
- Additional flexibility permits a greater portion of unspent funds to be carried into FY2027
- Address cost increases (food, fuel, etc.), support service continuity, and reduce the need for budget modifications/de-obligation
- Carryover request form will be provided with the upcoming budget package

HDM-ID

- No changes in the eligibility of Home Delivered Meal-Infrequent Delivery (HDM-ID) Waivers
- Area Plan Training will cover the expectations related to HDM-ID as we enter the final year of the Area Plan
- DAS will be connecting with those AAAs that currently use HDM-ID in preparation for the Area Plan