

# Division for Aging Services

CFO Touch Base

January 29, 2025



# Agenda

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- Welcome/Opening/Agenda Review
- New DARS Fiscal Personnel
- Area Plan and Budget Process Enhancements
- Annually Required Documents
- ACS Data
- Funding Formula Factor Overview
- Expenditure Analysis
- Grab & Go Data
- Question and Answer

**Welcome Justin Dobson**

**Grants and Contracts Monitor**

# Area Plan/Budget Background



- FY2024 - FY2027 AAA Area Plans and Budgets were submitted in July 2023
- The Area Plan contracts were issued in February 2024, pending modifications
- Area Plan modifications were completed in July 2024
- FY2025 revisions to the Area Plan and Budget were submitted in July 2024
- FY2025 contract modifications have been issued (October 2024 – September 2025)

# AP/Budget Enhancements



- Continuous process improvement sessions with the DARS OAA New Regulations Team
- Understand the delays in contract issuance and affiliated timeframe have been a discussion item
- Solution:
  - Separate requirements for the area plan – those items necessary for contract development
    - Area Plan Part I (area plan document) and Area Plan Part II (budget)
  - Delineate those items with timeline flexibility
    - List of Annually Required Documents

# Annually Required Documents



- Due Date: February 1 each year
  - 1. AAA Information Form
  - 2. Governing Board
  - 3. Governing Board Bylaws
  - 4. Advisory Council
  - 5. Advisory Council Bylaws
  - 6. Organizational Chart
  - 7. Staff Listing
  - 8. Continuity of Operations Plan (COOP)
  - 9. All-Hazards Emergency Response Plan
  - 10. Risk Assessments

# Annually Required Docs (cont)



- Providers' Portal: centrally located on the landing page and the in the form's directory
- Each form is numerically labelled 1-10
- Naming convention:
  - i.e., "3. Governing Board Bylaws-PSA XX"
  - i.e., "8. COO Plan-PSA XX"
- Some forms will need to be updated and submitted as changes occur throughout the year
  - AAA Information Form, Governing Board, and Advisory Council

# Instructions and Checklist



VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

**DIVISION FOR AGING SERVICES**

## Annually Required Documents

**Instructions:** Please review the checklist below and provide the required documents on or before February 1st each year.

### Checklist:

1. AAA Information Form \*
2. Governing Board \*
3. Governing Board Bylaws
4. Advisory Council \*
5. Advisory Council Bylaws
6. Organizational Chart
7. Staff Listing
8. Continuity of Operations Plan (COOP)
9. All-Hazards Emergency Response Plan
10. Risk Assessments



# 1. AAA Information Form

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- Agency information including executive staff and contact information
- Staff authorized to invoice DARS
- AAA e-mail groups
  - Fiscal Staff
  - Nutrition Coordinators
  - PeerPlace Data Entry Personnel and more

## 2. Governing Board



- Executive Board form now includes a Secretary position
- Added contact information and organizational affiliation

<b>Board Member:</b>	
County or City of Residence:	
Date of Appointment:	Type of Appointment*:
Organizational Affiliation:	
Non-Agency Address:	
Non-Agency Phone:	
Non-Agency E-mail:	

# 4. Advisory Council

General Membership Characteristics	Number
<b>Membership Type (e.g., a., b., c.)</b>	<hr/>
<p>a. Older individuals, including minority individuals who are participants or who are eligible to participate in Older Americans Act programs, with efforts to include individuals who are in greatest economic need and individuals who are in greatest social need.</p>	<hr/>
<p>b. Representatives of older individuals</p>	<hr/>
<p>c. Family caregivers, which may include older relative caregivers</p>	<hr/>
<p>d. Representatives of health care provider organizations, including providers of veterans' health care (if appropriate)</p>	<hr/>
<p>e. Representatives of service providers, which may include legal assistance, nutrition, evidence-based disease prevention and health promotion, caregiver, long-term care ombudsman, and other service providers</p>	<hr/>
<p>f. Persons with leadership experience in the private and voluntary sectors;</p>	<hr/>
<p>g. Local elected officials</p>	<hr/>
<p>h. The general public</p>	<hr/>
<p>i. Representatives from Indian Tribes, Pueblos, or Tribal aging programs (as available)</p>	<hr/>
<p>j. Older relative caregivers, including kin and grandparent caregivers of children or adults aged 18 to 59 with a disability (as available)</p>	<hr/>

# Advisory Council (cont.)



## ADVISORY COUNCIL MEMBERSHIP

(If a position is unfilled, please list as "VACANT" on the list below.)

	Type*	Member	County or City of Residence	Email Address
1				
2				
3				
4				
5				
6				
7				
8				
9				

# Further Changes



- Removed from Area Plan and included in annually required documents:
  - 6. Organizational Chart
  - 7. Staff Listing
  - 8. COOP
  
- New items added to the annually required documents
  - 9. All-Hazards Emergency Response Plan
  - 10. Risk Assessments

# American Community Survey



- American Community Survey (ACS) Special Tabulations 2017-2021
- The five year American Community Survey (ACS) Special Tabulation on Aging is based on the Census Bureau's ACS data. Detailed tables for each of the 50 states, the District of Columbia, Puerto Rico, and the American Indian, Alaska Native, and Native Hawaiian areas (AIANNH) are included. Geographic levels of aggregation include state, county, ACL's planning and service areas (PSAs), tribal areas, census tracts, and ZIP Code tabulation areas. Some geographic units are not shown due to too few cases, and many tables have two versions in order to provide an alternative which minimizes the loss of data due to disclosure protection. The results may be used for many purposes including serving as a component in the allocation formulas for Older Americans Act funding and for planning programs and services for the aging.

# Virginia Data Location



 HHS Administration for Community Living













## AGID AGing, Independence, and Disability Program Data Portal



Texas (.zip / 109.3 MB)  
Utah (.zip / 15.09 MB)  
Virginia (.zip / 47.14 MB)  
Vermont (.zip / 9.06 MB)  
Washington (.zip / 40.42 MB)  
Wisconsin (.zip / 49.99 MB)

# Zipped Data Files



Name	Type	Compressed size	Password pr...	Size	Ratio	Date modified
 VAs210dis01.xlsx	Microsoft Excel Worksheet	615 KB	No	618 KB	1%	9/13/2023 12:24 PM
 VAs210dis02.xlsx	Microsoft Excel Worksheet	1,479 KB	No	1,493 KB	1%	9/13/2023 12:24 PM
 VAs210dis03.xlsx	Microsoft Excel Worksheet	1,450 KB	No	1,463 KB	1%	9/13/2023 12:24 PM
 VAs210dis04.xlsx	Microsoft Excel Worksheet	1,435 KB	No	1,449 KB	2%	9/13/2023 12:24 PM
 VAs210dis05.xlsx	Microsoft Excel Worksheet	1,456 KB	No	1,469 KB	1%	9/13/2023 12:24 PM
 VAs210dis06.xlsx	Microsoft Excel Worksheet	1,458 KB	No	1,471 KB	1%	9/13/2023 12:25 PM
 VAs210dis07.xlsx	Microsoft Excel Worksheet	1,438 KB	No	1,452 KB	1%	9/13/2023 12:25 PM
 VAs210dis08.xlsx	Microsoft Excel Worksheet	1,347 KB	No	1,354 KB	1%	9/13/2023 12:25 PM
 VAs210dis09.xlsx	Microsoft Excel Worksheet	2,273 KB	No	2,302 KB	2%	9/13/2023 12:25 PM
 VAs210dis10.xlsx	Microsoft Excel Worksheet	2,381 KB	No	2,433 KB	3%	9/13/2023 12:25 PM
 VAs210dis11.xlsx	Microsoft Excel Worksheet	151 KB	No	155 KB	3%	9/13/2023 12:25 PM
 VAs210dis12.xlsx	Microsoft Excel Worksheet	137 KB	No	141 KB	3%	9/13/2023 12:25 PM



# File Example



Virginia 2017-2021

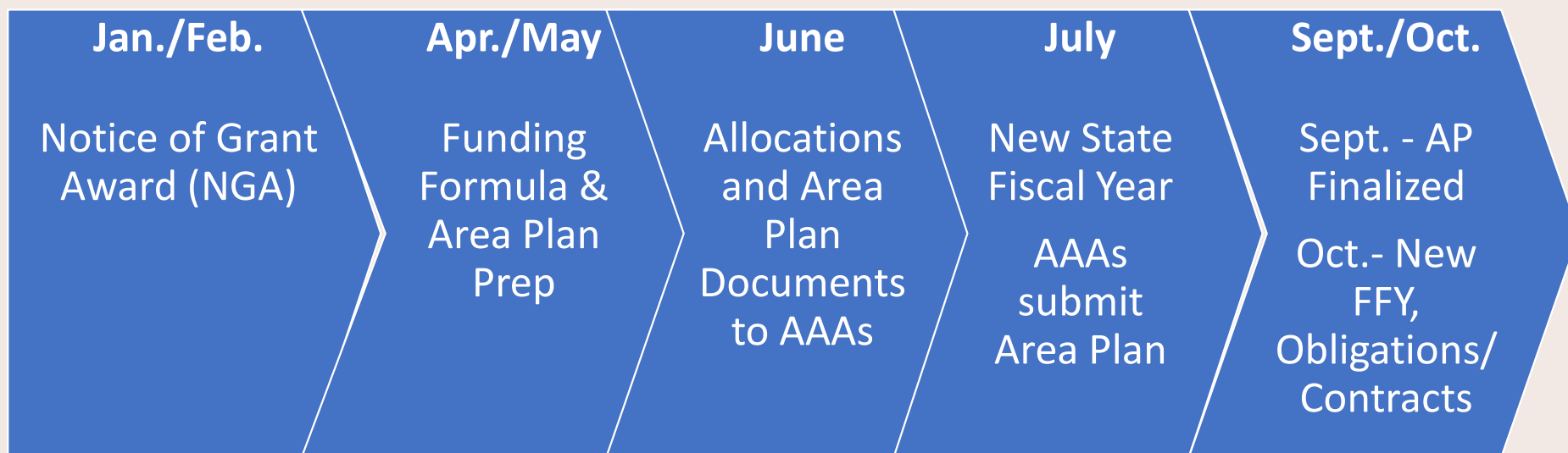
Table S21003R - Age by Race

Universe: Total population

[Based on a sample. Rounded data. Data are suppressed for geographic areas if they do not meet the specified population threshold.]

Geography Geographic ID		Total:		Under 55 years, Subtotal		White alone		Black or African American alone		Asian alone	
		Estimate	Standard Error	Estimate	Standard Error	Estimate	Standard Error	Estimate	Standard Error	Estimate	Standard Error
		Geographic Name									
0100000US	United States	329725480	*****	234007445	2509	150648250	46640	31543795	22131	14234110	13001
0400000US51	Virginia	8582480	*****	6131245	587	3771050	3950	1207705	2975	449495	1831
0000000US5100001	PSA 1	84285	*****	54410	211	50145	155	2785	216	145	24
0000000US5100002	PSA 2	101420	*****	63040	88	59405	94	1885	151	280	70
0000000US5100003	PSA 3	186800	*****	116095	253	107320	337	3475	300	730	119
0000000US5100004	PSA 4	181690	*****	130745	100	112305	257	6090	220	6220	233
0000000US5100005	PSA 5	280655	*****	185380	205	138430	487	28485	609	6025	225
0000000US5100006	PSA 6	302680	*****	206670	262	172295	739	12915	462	3340	206
0000000US5100007	PSA 7	241420	*****	162520	112	137390	699	7090	330	2535	169
0000000US5100009	PSA 9	181570	*****	122480	116	94960	521	12165	390	1550	205
0000000US5100010	PSA 10	257420	*****	175530	115	131790	453	21125	383	9010	238
0000000US5100011	PSA 11	261230	*****	176030	137	130370	417	31635	364	3060	167
0000000US5100012	PSA 12	240430	*****	148035	71	100110	359	36945	386	1160	82
0000000US5100013	PSA 13	80620	*****	48805	81	26200	166	20060	240	295	47
0000000US5100014	PSA 14	100860	*****	66460	80	41550	266	20770	290	320	84

# Timeline



# Current Funding Formula Factor



VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

**DIVISION FOR AGING SERVICES**

PSA	PERCENT
1	2.42069
2	3.05284
3	4.55879
4	2.21923
5	4.21242
6	4.12036
7	3.34131
8A	1.31768
8B	1.86272
8C	7.38620
8D	1.58168
8E	2.55965

9	2.35202
10	3.15031
11	3.25001
12	6.49286
13	2.75860
14	3.29955
15	11.17137
16	2.85921
17/18	3.89055
19	3.18999
20	11.43991
21	5.93253
22	1.57954

# Factor Weights

- Population 60+ in Poverty = 50%
- Population 60+ = 20%
- Populations 60+ in Rural Jurisdictions = 10%
- Population 60+ Minority in Poverty = 10%
- AAA Share of the Population 60+ = 10%

(Applicable to Subtitles III-B, Supportive Services; III-C, Nutrition; III-D, Disease Prevention and Health Promotion; III-E, National Family Caregiver Support; and VII-Chapter 3, Prevention of Elder Abuse, Neglect, and Exploitation)

# Description of Factors



- **Population 60+ in Poverty:** This factor is an application of the definition of greatest economic need as required by the Older Americans Act. The financial condition of the older person is a major determinant of his or her ability to meet basic life needs such as food, shelter, mobility, and healthcare.
- **Population 60+:** This factor is the basis for the distribution of funds by jurisdiction (county and city) of older Virginians. It reflects the number of persons age 60 and older throughout the Commonwealth by jurisdiction as provided by the U.S. Bureau of the Census.

## Description of Factors (cont)



- **Population 60+ Minority in Poverty:** This factor addresses the special needs of older racial and ethnic minorities in Virginia as well as the economic needs of this group.
- **Population 60+ in Rural Jurisdictions:** This factor addresses the geographical isolation faced by older Virginians who live in the rural areas. DARS defines "rural" as any jurisdiction (city or county) which is not within a Metropolitan Statistical Area (MSA) or any jurisdiction which is within an MSA but which has a population density of 50 persons or less per square mile.

## Description of Factors (cont 2)



- **AAA Share of Population 60+:** This factor addresses the unique needs of localities who have a higher proportion of older adults relative to the jurisdiction's overall population, which can reflect increased burden on the locality in meeting the needs of older adults.

# Sample Calculation



VIRGINIA DEPARTMENT FOR AGING AND REHABILITATIVE SERVICES

DIVISION FOR AGING SERVICES

	POP 60+	% POP 60+	POP 60+ WEIGHTED 20%	RURAL POP 60+	% RURAL POP 60+	RURAL POP 60+ WEIGHTED 10%	POP 60+ BEL POV	% POP 60+ BEL POV	POP 60+ BEL POV WEIGHTED 50%
<b>PSA 1</b>									
LEE CO.	6,290	0.33673	0.06735	6,290	1.73776	0.17378	879	0.61139	0.30570
SCOTT CO.	6,765	0.36215	0.07243	6,765	1.86899	0.18690	1,029	0.71573	0.35786
WISE CO.	9,515	0.50937	0.10187	9,515	2.62874	0.26287	1,274	0.88614	0.44307
NORTON CITY	1,135	0.06076	0.01215	1,135	0.31357	0.03136	180	0.12520	0.06260

	MINORITY 60+ BEL POV	% MINORITY 60+ BEL POV	MINORITY 60+ BEL POV WEIGHTED 10%	PSA SHARE POP 60+	% PSA SHARE POP 60+	PSA SHARE POP 60+ WEIGHTED 10%	UNADJUSTED TOTAL	PSA FORMULA %
<b>PSA 1</b>								
LEE CO.	19	0.03309	0.00331	27.98043%	0.79160	0.07916	0.62929	2.42069
SCOTT CO.	4	0.00697	0.00070	31.35574%	0.88710	0.08871	0.70660	
WISE CO.	59	0.10277	0.01028	26.04708%	0.73691	0.07369	0.89179	
NORTON CITY	-	0.00000	0.00000	30.71719%	0.86903	0.08690	0.19301	



# Current Funding Formula Factor



VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

**DIVISION FOR AGING SERVICES**

PSA	PERCENT
1	2.42069
2	3.05284
3	4.55879
4	2.21923
5	4.21242
6	4.12036
7	3.34131
8A	1.31768
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9	2.35202
10	3.15031
11	3.25001
12	6.49286
13	2.75860
14	3.29955
15	11.17137
16	2.85921
17/18	3.89055
19	3.18999
20	11.43991
21	5.93253
22	1.57954

# Balance of FY2024 OAA Funds



VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

DIVISION FOR AGING SERVICES

■ III-B Supportive Services	\$1,858,665
■ III-C1 Congregate Meals	\$1,241,249
■ III-C2 Home Delivered Meals	\$2,426,359
■ III-D Preventative Health	\$151,326
■ III-E Family Caregiver	\$890,351
■ VII-G Elder Abuse	\$8,372
■ VII Ombudsman	\$27,186
■ Total	\$6,603,499

# Balance of FY2025 OAA Funds



VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES  
DIVISION FOR AGING SERVICES

■ III-B Supportive Services	\$11,301,265
■ III-C1 Congregate Meals	\$6,117,758
■ III-C2 Home Delivered Meals	\$9,231,178
■ III-D Preventative Health	\$526,927
■ III-E Family Caregiver	\$4,041,463
■ VII-G Elder Abuse	\$80,217
■ VII Ombudsman	\$456,243
■ Total	\$31,755,051

# Budget vs. AMR Report



- Published monthly after Q1
- Purpose is to assist AAA assess the spending in relation to the approved budget
- Report will list federal OAA awards along with state general funds for OAA programs and services
- Reviews budget units vs. units entered and targeted number of clients vs. actual persons served
- Yellow highlighted items indicate these areas tracking over the proportionate budget (i.e., currently 25% thru FFY25 with an acceptable range of 15-35%)

Proportionate Year-to-Date Contract Amounts: 15.0% to 35.0%

Service	OAA/Gen Budget	OAA/Gen Spending	Balance	% Spent (see above)
Adult Day Care				
Checking	\$18,396	\$5,297	\$13,099	28.8%
Chore	\$42,323	\$5,004	\$37,319	11.8%
Homemaker	\$31,654	\$3,694	\$27,960	11.7%
Personal Care				
Care / Service Coordination Level 2	\$108,970	\$23,885	\$85,085	21.9%
Service Coordination Level 1				
Care Transitions	\$372,678	\$95,911	\$276,767	25.7%
S.O.S.				
Information & Referral Assistance	\$715,547	\$169,095	\$546,452	23.6%
Options Counseling	\$102,737	\$20,860	\$81,877	20.3%
Transportation	\$521,729	\$148,999	\$372,730	28.6%
Assisted Transportation				
Congregate	\$1,201,703	\$193,250	\$1,008,453	16.1%
Home Delivered	\$1,665,594	\$395,678	\$1,269,916	23.8%
Home Delivered Fee for Service				
Nutrition Counseling	\$10,000	\$420	\$9,580	4.2%
Nutrition Education	\$50,000	\$13,615	\$36,385	27.2%
Disease Prevention	\$33,512	\$23,330	\$10,182	69.6%
CDSME				
Falls Prevention				
Health Education Screening				
Assistive Tech DME / PERS - Devices				
Assistive Tech DME / PERS - Payment				
Consumable Supplies				
Emergency	\$3,800	\$3,800		100.0%
Employment	\$104,819	\$24,444	\$80,375	23.3%
LTC Coordinating Activity				
Medication Management				
Money Management	\$76,356	\$17,476	\$58,880	22.9%
Outreach / Public Information Education	\$148,963	\$43,679	\$105,284	29.3%
Residential Repair & Renovation	\$96,336	\$34,127	\$62,209	35.4%
Socialization & Recreation	\$2,000	\$1,375	\$625	68.8%
Volunteer Programs	\$282,509	\$79,484	\$203,025	28.1%
Legal Assistance	\$25,000		\$25,000	
Elder Abuse Prevention	\$29,654	\$6,377	\$23,277	21.5%
Local LTC Ombudsman	\$261,730	\$55,068	\$206,662	21.0%
Incentive Program				
Preparation & Administration	\$163,554	\$45,063	\$118,491	27.6%
<b>Total</b>	<b>\$6,069,564</b>	<b>\$1,409,931</b>	<b>\$4,659,633</b>	<b>23.2%</b>

Percent of year complete  
=

25.0%

Budget Units	Actual Units	% Provided (see above)	Actual Unit Cost	Planned Persons Served	Actual Persons Served	Units Per Person
3,400	775	22.8%	\$6.83	35	27	28.7
80	20	25.0%	\$250.20	10	3	6.7
800	39	4.9%	\$94.72	10	2	19.5
550	84	15.3%	\$284.35	40	14	6.0
1,200	327	27.3%	\$293.31	575	81	4.0
13,000	3,783	29.1%	\$53.40	9,250	1,243	3.0
3,000	687	22.9%	\$30.36	900	317	2.2
14,500	2,708	18.7%	\$55.22	340	125	21.7
39,000	6,825	17.5%	\$38.56	750	538	12.7
120,000	50,471	42.1%	\$7.85	1,200	980	51.5
32	7	21.9%	\$60.00	25	7	1.0
3,000	1,423	47.4%	\$9.57	400	363	3.9
6,120	1,486	24.3%	\$15.70	340	188	7.9
160	173	108.1%	\$125.40	160	17	10.2
420	147	35.0%	\$166.29	75	77	1.9
1,200	267	22.3%	\$65.45	45	22	12.1
80,000	21,822	27.3%	\$2.00			
20	5	25.0%	\$6,825.40	20	5	1.0
23,000	452	2.0%	\$3.04	605	113	4.0
11,500	2,683	23.3%	\$29.63	200	150	17.9
1,200				350		
133	27	20.3%	\$236.19	100	20	1.4

# Grab & Go

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- PeerPlace – in process of adding new service types if the AAA has not been previously mapped
- New service type will be added to programs where currently tracking congregate and home delivered meals
- Important - program communicate to those entering data into PeerPlace in order to appropriately record units
- New Event Profile – instructional guide named ‘Enrollment and Service Units Entry’ in PeerPlace under Support/NWD Documents

## Grab & Go (cont)

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- “Grab & Go Meals” – shelf-stable, pick-up, carry-out, drive-through, or similar meals.
- Only 25% of congregate meal dollars can be used to claim Grab & Go (no cap on HDM).
- Data will be captured on AMR where these new meal types have been added



# AMR Location



VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

**DIVISION FOR AGING SERVICES**

PSA: 0							
Month:							
YTD Expenditures		Nutrition					
Funding Source	Congregate	Congregate Grab & Go Meals	Home Delivered	Home Delivered Grab & Go Meals	Home Delivered Fee for Service	Nutrition Counseling	Nutrition Education
<b>Older Americans Act</b>							
Title III-B							
Title III-C(1)							
Title III-C(2)							
Title III-D							
Title VII - Ombudsman							
Title VII - Elder Abuse							
<b>Other Funds</b>							
Other Non-Federal							
Voluntary Contributions							
Fees							
<b>Other Federal</b>							
DMAS - Ombudsman							
Other Local Federal Funding							
NSIP							
<b>General Funds</b>							
OAA General							
Community Based							
Transportation							
Home Delivered Meals							
Supplemental Nutrition							
CCEVP							
Ombudsman							
<b>Total Cash</b>							
<b>In-Kind Amount</b>							
<b>Service Data:</b>							
Actual Number of Units							
Unit Defined as:	Eligible Meals	Meals	Meals	Meals	Non NSIP Meals	Hours	Sessions
Unit Cost							
Actual Persons Served							

# Additional Items

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- Annual Audits
- General Assembly in session
- Await final grant awards for FFY25
- Upcoming training for new area plan template

# Questions