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ATTACHMENT A
ASSURANCES AND REQUIRED ACTIVITIES

STATE PLAN ASSURANCES AND REQUIRED ACTIVITIES
Older Americans Act, As Amended in 2020
By signing this document, the authorized official commits the State Agency on Aging to performing all listed assurances and activities as stipulated in the Older Americans Act, as amended in 2020.
Sec. 305, ORGANIZATION
(a) In order for a State to be eligible to participate in programs of grants to States from allotments under this title—. . .
(2) The State agency shall—

A. except as provided in subsection (b)(5), designate for each such area after consideration of the views offered by the unit or units of general purpose local government in such area, a public or private nonprofit agency or organization as the area agency on aging for such area;

B. provide assurances, satisfactory to the Assistant Secretary, that the State agency will take into account, in connection with matters of general policy arising in the development and administration of the State plan for any fiscal year, the views of recipients of supportive services or nutrition services, or individuals using multipurpose senior centers provided under such plan; . . .

E. provide assurance that preference will be given to providing services to older individuals with greatest economic need and older individuals with greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas), and include proposed methods of carrying out the preference in the State plan;

F. provide assurances that the State agency will require use of outreach efforts described in section 307(a)(16); and

(G)(i) set specific objectives, in consultation with area agencies on aging, for each planning and service area for providing services funded under this title to low-income minority older individuals and older individuals residing in rural areas;

ii. provide an assurance that the State agency will undertake specific program development, advocacy, and outreach efforts focused on the needs of low-income minority older individuals;

iii. provide a description of the efforts described in clause (ii) that will be undertaken by the State agency; . . .

(c) An area agency on aging designated under subsection (a) shall be—...

(5) in the case of a State specified in subsection (b)(5), the State agency;
and shall provide assurance, determined adequate by the State agency, that the area agency on aging will have the ability to develop an area plan and to carry out, directly or through contractual or other arrangements, a program in accordance with the plan within the planning and service area. In designating an area agency on aging within the planning and service area or within any unit of general purpose local government designated as a planning and service area the State shall give preference to an established office on aging, unless the State agency finds that no such office within the planning and service area will have the capacity to carry out the area plan.

(d) The publication for review and comment required by paragraph (2)(C) of subsection
(a) shall include—

1. a descriptive statement of the formula's assumptions and goals, and the application of the definitions of greatest economic or social need,
2. a numerical statement of the actual funding formula to be used,
3. a listing of the population, economic, and social data to be used for each planning and service area in the State, and
4. a demonstration of the allocation of funds, pursuant to the funding formula, to each planning and service area in the State.

Note: States must ensure that the following assurances (Section 306) will be met by its designated area agencies on agencies, or by the State in the case of single planning and service area states.

Sec. 306, AREA PLANS

a. Each area agency on aging designated under section 305(a)(2)(A) shall, in order to be approved by the State agency, prepare and develop an area plan for a planning and service area for a two-, three-, or four-year period determined by the State agency, with such annual adjustments as may be necessary. Each such plan shall be based upon a uniform format for area plans within the State prepared in accordance with section 307(a)(1). Each such plan shall—

1. provide, through a comprehensive and coordinated system, for supportive services, nutrition services, and, where appropriate, for the

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establishment, maintenance, modernization, or construction of multipurpose senior centers (including a plan to use the skills and services of older individuals in paid and unpaid work, including multigenerational and older individual to older individual work), within the planning and service area covered by the plan, including determining the extent of need for supportive services, nutrition services, and multipurpose senior centers in such area (taking into consideration, among other things, the number of older individuals with low incomes residing in such area, the number of older individuals who have greatest economic need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) residing in such area, the number of older individuals who have greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) residing in such area, the number of older individuals at risk for institutional placement residing in such area, and the number of older individuals who are Indians residing in such area, and the efforts of voluntary organizations in the community), evaluating the effectiveness of the use of resources in meeting such need, and entering into agreements with providers of supportive services, nutrition services, or multipurpose senior centers in such area, for the provision of such services or centers to meet such need;

2. provide assurances that an adequate proportion, as required under section 307(a)(2), of the amount allotted for part B to the planning and service area will be expended for the delivery of each of the following categories of services—

A. services associated with access to services (transportation, health services (including mental and behavioral health services), outreach, information and assistance (which may include information and assistance to consumers on availability of services under part B and how to receive benefits under and participate in publicly supported programs for which the consumer may be eligible) and case management services);

B. in-home services, including supportive services for families of older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and

C. legal assistance;

and assurances that the area agency on aging will report annually to the State agency in detail the amount of funds expended for each such category during the fiscal year most recently concluded;

(3)(A) designate, where feasible, a focal point for comprehensive service delivery in each community, giving special consideration to designating multipurpose senior centers (including multipurpose senior centers operated by organizations referred to in paragraph (6)(C)) as such focal point; and
(B) specify, in grants, contracts, and agreements implementing the plan, the identity of each focal point so designated;
(4)(A)(i) (I) provide assurances that the area agency on aging will—
(aa) set specific objectives, consistent with State policy, for providing services to older individuals with greatest economic need, older individuals with greatest social need, and older individuals at risk for institutional placement;

(bb) include specific objectives for providing services to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas; and
(II) include proposed methods to achieve the objectives described in items (aa) and (bb) of sub-clause (I);

- ii. provide assurances that the area agency on aging will include in each agreement made with a provider of any service under this title, a requirement that such provider will—
  - I. specify how the provider intends to satisfy the service needs of low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in the area served by the provider;
  - II. to the maximum extent feasible, provide services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; and
  - III. meet specific objectives established by the area agency on aging, for providing services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area; and
- iii. with respect to the fiscal year preceding the fiscal year for which such plan is prepared —
  - I. identify the number of low-income minority older individuals in the planning and service area;
  - II. describe the methods used to satisfy the service needs of such minority older individuals; and
  - III. provide information on the extent to which the area agency on aging met the objectives described in clause (i).

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B. provide assurances that the area agency on aging will use outreach efforts that will—

i. identify individuals eligible for assistance under this Act, with special emphasis on—

I. older individuals residing in rural areas;

II. older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);

III. older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas);

IV. older individuals with severe disabilities;

V. older individuals with limited English proficiency;

VI. older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and

VII. older individuals at risk for institutional placement, specifically including survivors of the Holocaust; and

ii. inform the older individuals referred to in sub-clauses (I) through (VII) of clause (i), and the caretakers of such individuals, of the availability of such assistance; and

C. contain an assurance that the area agency on aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas.

2. provide assurances that the area agency on aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement, with agencies that develop or provide services for individuals with disabilities;

3. provide that the area agency on aging will—

A. take into account in connection with matters of general policy arising in the development and administration of the area plan, the views of recipients of services under such plan;

B. serve as the advocate and focal point for older individuals within the community by (in cooperation with agencies, organizations, and individuals participating in activities under the plan) monitoring, evaluating, and commenting upon all policies, programs, hearings, levies, and community actions which will affect older individuals;

(C)(i) where possible, enter into arrangements with organizations providing day care services for children, assistance to older individuals caring for relatives who are children, and respite for families, so as to provide opportunities for older individuals to aid or assist on a voluntary basis in the delivery of such services to children, adults, and families;

ii. if possible regarding the provision of services under this title, enter into arrangements and coordinate with organizations that have a proven record of providing services to older individuals, that—

(I) were officially designated as community action agencies or community action programs under section 210 of the Economic Opportunity Act of 1964 (42U.S.C. 2790) for fiscal year 1981, and did not lose the designation as a result of failure to comply with such Act; or

(II) came into existence during fiscal year 1982 as direct successors in interest to such community action agencies or community action programs;

and that meet the requirements under section 676B of the Community Services Block Grant Act; and

iii. make use of trained volunteers in providing direct services delivered to older individuals and individuals with disabilities needing such services and, if possible, work in coordination with organizations that have experience in providing training, placement, and stipends for volunteers or participants (such as organizations carrying out Federal service programs administered by the Corporation for National and Community Service), in community service settings;

D. establish an advisory council consisting of older individuals (including minority individuals and older individuals residing in rural areas) who are participants or who are eligible to participate in programs assisted under this Act, family caregivers of such individuals, representatives of older individuals, service providers, representatives of the business community, local elected officials, providers of veterans' health care (if appropriate), and the general public, to advise continuously the area agency on aging on all matters relating to the development of the area plan, the administration of the plan and operations conducted under the plan;

E. establish effective and efficient procedures for coordination of—

i. entities conducting programs that receive assistance under this Act within the planning and service area served by the agency; and

ii. entities conducting other Federal programs for older individuals at the local level, with particular emphasis on entities conducting programs described in section 203(b), within the area;

F. in coordination with the State agency and with the State agency responsible for mental and behavioral health services, increase public awareness of mental health disorders, remove barriers to diagnosis and treatment, and coordinate mental and behavioral health services (including mental health screenings) provided with funds expended by the area agency on aging with mental and behavioral health services provided by community health centers and by other public agencies and nonprofit private organizations;

G. if there is a significant population of older individuals who are Indians in the planning and service area of the area agency on aging, the area agency on aging shall conduct outreach activities to identify such individuals in such area and shall inform such individuals of the availability of assistance under this Act;

H. in coordination with the State agency and with the State agency responsible for elder abuse prevention services, increase public awareness of elder abuse, neglect, and exploitation, and remove barriers to education, prevention, investigation, and treatment of elder abuse, neglect, and exploitation, as appropriate; and

I. to the extent feasible, coordinate with the State agency to disseminate information about the State assistive technology entity and access to assistive technology options for serving older individuals;

4. provide that the area agency on aging shall, consistent with this section, facilitate the areawide development and implementation of a comprehensive, coordinated system for providing long-term care in home and community-based settings, in a manner responsive to the needs and preferences of older individuals and their family caregivers, by—

A. collaborating, coordinating activities, and consulting with other local public and private agencies and organizations responsible for administering programs, benefits, and services related to providing long-term care;

B. conducting analyses and making recommendations with respect to strategies for modifying the local system of long-term care to better—

i. respond to the needs and preferences of older individuals and family caregivers;

ii. facilitate the provision, by service providers, of long-term care in home and community-based settings; and

iii. target services to older individuals at risk for institutional placement, to permit such individuals to remain in home and community-based settings;

C. implementing, through the agency or service providers, evidence-based programs to assist older individuals and their family caregivers in learning about and making behavioral changes intended to reduce the risk of injury, disease, and disability among older individuals; and

D. providing for the availability and distribution (through public education campaigns, Aging and Disability Resource Centers, the area agency on aging itself, and other appropriate means) of information relating to—

i. the need to plan in advance for long-term care; and

ii. the full range of available public and private long-term care (including integrated long-term care) programs, options, service providers, and resources;

5. provide that case management services provided under this title through the area agency on aging will—

A. not duplicate case management services provided through other Federal and State programs;

B. be coordinated with services described in subparagraph (A); and

C. be provided by a public agency or a nonprofit private agency that—

i. gives each older individual seeking services under this title a list of agencies that provide similar services within the jurisdiction of the area agency on aging;

ii. gives each individual described in clause (i) a statement specifying that the individual has a right to make an independent choice of service providers and documents receipt by such individual of such statement;

iii. has case managers acting as agents for the individuals receiving the services and not as promoters for the agency providing such services; or

iv. is located in a rural area and obtains a waiver of the requirements described in clauses (i) through (iii);

(9)(A) provide assurances that the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 307(a)(9), will expend not less than the total amount of funds appropriated under this Act and expended by the agency in fiscal year 2019 in carrying out such a program under this title;

(B) funds made available to the area agency on aging pursuant to section 712 shall be used to supplement and not supplant other Federal, State, and local funds expended to support activities described in section 712;

10. provide a grievance procedure for older individuals who are dissatisfied with or denied services under this title;

11. provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as "older Native Americans"), including—

A. information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, an assurance that the area agency on aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under this title;

B. an assurance that the area agency on aging will, to the maximum extent practicable, coordinate the services the agency provides under this title with services provided under title VI; and

C. an assurance that the area agency on aging will make services under the area plan available, to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans;

12. provide that the area agency on aging will establish procedures for coordination of services with entities conducting other Federal or federally assisted programs for older individuals at the local level, with particular emphasis on entities conducting programs described in section 203(b) within the planning and service area.

13. provide assurances that the area agency on aging will—

A. maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships;

B. disclose to the Assistant Secretary and the State agency—

i. the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals; and

ii. the nature of such contract or such relationship;

C. demonstrate that a loss or diminution in the quantity or quality of the services provided, or to be provided, under this title by such agency has not resulted and will not result from such contract or such relationship;

D. demonstrate that the quantity or quality of the services to be provided under this title by such agency will be enhanced as a result of such contract or such relationship; and

E. on the request of the Assistant Secretary or the State, for the purpose of monitoring compliance with this Act (including conducting an audit), disclose all sources and expenditures of funds such agency receives or expends to provide services to older individuals;

14. provide assurances that preference in receiving services under this title will not be given by the area agency on aging to particular older

individuals as a result of a contract or commercial relationship that is not carried out to implement this title;

15. provide assurances that funds received under this title will be used—

A. to provide benefits and services to older individuals, giving priority to older individuals identified in paragraph (4)(A)(i); and

B. in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;

16. provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care;

17. include information detailing how the area agency on aging will coordinate activities, and develop long-range emergency preparedness plans, with local and State emergency response agencies, relief organizations, local and State governments, and any other institutions that have responsibility for disaster relief service delivery;

18. provide assurances that the area agency on aging will collect data to determine—

A. the services that are needed by older individuals whose needs were the focus of all centers funded under title IV in fiscal year 2019; and

B. the effectiveness of the programs, policies, and services provided by such area agency on aging in assisting such individuals; and

19. provide assurances that the area agency on aging will use outreach efforts that will identify individuals eligible for assistance under this Act, with special emphasis on those individuals whose needs were the focus of all centers funded under title IV in fiscal year 2019.

(b)(1) An area agency on aging may include in the area plan an assessment of how prepared the area agency on aging and service providers in the planning and service area are for any anticipated change in the number of older individuals during the 10-year period following the fiscal year for which the plan is submitted.

2. Such assessment may include—

A. the projected change in the number of older individuals in the planning and service area;

B. an analysis of how such change may affect such individuals, including individuals
with low incomes, individuals with greatest economic need, minority older individuals, older individuals residing in rural areas, and older individuals with limited English proficiency;

C. an analysis of how the programs, policies, and services provided by such area agency can be improved, and how resource levels can be adjusted to meet the needs of the changing population of older individuals in the planning and service area; and

D. an analysis of how the change in the number of individuals age 85 and older in the planning and service area is expected to affect the need for supportive services.

3. An area agency on aging, in cooperation with government officials, State agencies, tribal organizations, or local entities, may make recommendations to government officials in the planning and service area and the State, on actions determined by the area agency to build the capacity in the planning and service area to meet the needs of older individuals for—

A. health and human services;
B. land use;
C. housing;
D. transportation;
E. public safety;
F. workforce and economic development;
G. recreation;
H. education;
I. civic engagement;
J. emergency preparedness;
K. protection from elder abuse, neglect, and exploitation;
L. assistive technology devices and services; and
M. any other service as determined by such agency.

(c) Each State, in approving area agency on aging plans under this section, shall waive the requirement described in paragraph (2) of subsection (a) for any category of services described in such paragraph if the area agency on aging demonstrates to the State agency that services being furnished for such category in the area are sufficient to meet the need for such services in such area and had conducted a timely public hearing upon request.

(d)(1) Subject to regulations prescribed by the Assistant Secretary, an area agency on aging designated under section 305(a)(2)(A) or, in areas of a State where no such agency has been designated, the State agency, may enter into agreement with agencies administering programs under the Rehabilitation Act of 1973, and titles XIX and XX of the Social Security Act for the purpose of developing and implementing plans for meeting the common need for transportation services of individuals receiving benefits under such Acts and older individuals participating in programs authorized by this title.

(2) In accordance with an agreement entered into under paragraph (1), funds appropriated under this title may be used to purchase transportation services for older individuals and may be pooled with funds made available for the

provision of transportation services under the Rehabilitation Act of 1973, and titles XIX and XX of the Social Security Act.
(e) An area agency on aging may not require any provider of legal assistance under this title to reveal any information that is protected by the attorney-client privilege.
(f)(1) If the head of a State agency finds that an area agency on aging has failed to comply with Federal or State laws, including the area plan requirements of this section, regulations, or policies, the State may withhold a portion of the funds to the area agency on aging available under this title.
(2)(A) The head of a State agency shall not make a final determination withholding funds under paragraph (1) without first affording the area agency on aging due process in accordance with procedures established by the State agency.

B. At a minimum, such procedures shall include procedures for—

i. providing notice of an action to withhold funds;
ii. providing documentation of the need for such action; and
iii. at the request of the area agency on aging, conducting a public hearing concerning the action.

(3)(A) If a State agency withholds the funds, the State agency may use the funds withheld to directly administer programs under this title in the planning and service area served by the area agency on aging for a period not to exceed 180 days, except as provided in subparagraph (B).
(B) If the State agency determines that the area agency on aging has not taken corrective action, or if the State agency does not approve the corrective action, during the 180-day period described in subparagraph (A), the State agency may extend the period for not more than 90 days.

g. Nothing in this Act shall restrict an area agency on aging from providing services not provided or authorized by this Act, including through—

1. contracts with health care payers;
2. consumer private pay programs; or
3. other arrangements with entities or individuals that increase the availability of home and community-based services and supports.

Sec. 307, STATE PLANS

a. Except as provided in the succeeding sentence and section 309(a), each State, in order to be eligible for grants from its allotment under this title for any fiscal year, shall submit to the Assistant Secretary a State plan for a two, three, or four-year period determined by the State agency, with

Michelle Lujan Grisham, Governor
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such annual revisions as are necessary, which meets such criteria as the Assistant Secretary may by regulation prescribe. If the Assistant Secretary determines, in the discretion of the Assistant Secretary, that a State failed in 2 successive years to comply with the requirements under this title, then the State shall submit to the Assistant Secretary a State plan for a 1-year period that meets such criteria, for subsequent years until the Assistant Secretary determines that the State is in compliance with such requirements. Each such plan shall comply with all of the following requirements:

1. The plan shall—

A. require each area agency on aging designated under section 305(a)(2)(A) to develop and submit to the State agency for approval, in accordance with a uniform format developed by the State agency, an area plan meeting the requirements of section 306; and

B. be based on such area plans.

2. The plan shall provide that the State agency will—

A. evaluate, using uniform procedures described in section 202(a)(26), the need for supportive services (including legal assistance pursuant to 307(a)(11), information and assistance, and transportation services), nutrition services, and multipurpose senior centers within the State;

B. develop a standardized process to determine the extent to which public or private programs and resources (including volunteers and programs and services of voluntary organizations) that have the capacity and actually meet such need; and

C. specify a minimum proportion of the funds received by each area agency on aging in the State to carry out part B that will be expended (in the absence of a waiver under section 306(c) or 316) by such area agency on aging to provide each of the categories of services specified in section 306(a)(2).

3. The plan shall—

A. include (and may not be approved unless the Assistant Secretary approves) the statement and demonstration required by paragraphs (2) and (4) of section 305(d) (concerning intrastate distribution of funds); and

B. with respect to services for older individuals residing in rural areas—

i. provide assurances that the State agency will spend for each fiscal year, not less than the amount expended for such services for fiscal year 2000…

ii. identify, for each fiscal year to which the plan applies, the projected costs of providing such services (including the cost of providing access to such services); and

Michelle Lujan Grisham, Governor
Emily Kaltenbach, Cabinet Secretary
Antoinette Vigil, Deputy Cabinet Secretary
Angelina Flores-Montoya, Deputy Cabinet Secretary

iii. describe the methods used to meet the needs for such services in the fiscal year preceding the first year to which such plan applies.

4. The plan shall provide that the State agency will conduct periodic evaluations of, and public hearings on, activities and projects carried out in the State under this title and title VII, including evaluations of the effectiveness of services provided to individuals with greatest economic need, greatest social need, or disabilities (with particular attention to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas).

5. The plan shall provide that the State agency will—

A. afford an opportunity for a hearing upon request, in accordance with published procedures, to any area agency on aging submitting a plan under this title, to any provider of (or applicant to provide) services;

B. issue guidelines applicable to grievance procedures required by section 306(a)(10);

and

C. afford an opportunity for a public hearing, upon request, by any area agency on

aging, by any provider of (or applicant to provide) services, or by any recipient of services under this title regarding any waiver request, including those under section 316.

6. The plan shall provide that the State agency will make such reports, in such form, and containing such information, as the Assistant Secretary may require, and comply with such requirements as the Assistant Secretary may impose to insure the correctness of such reports.

(7)(A) The plan shall provide satisfactory assurance that such fiscal control and fund accounting procedures will be adopted as may be necessary to assure proper disbursement of, and accounting for, Federal funds paid under this title to the State, including any such funds paid to the recipients of a grant or contract.

B. The plan shall provide assurances that—

i. no individual (appointed or otherwise) involved in the designation of the State agency or an area agency on aging, or in the designation of the head of any subdivision of the State agency or of an area agency on aging, is subject to a conflict of interest prohibited under this Act;

ii. no officer, employee, or other representative of the State agency or an area agency on aging is subject to a conflict of interest prohibited under this Act; and

Michelle Lujan Grisham, Governor
Emily Kaltenbach, Cabinet Secretary
Antoinette Vigil, Deputy Cabinet Secretary
Angelina Flores-Montoya, Deputy Cabinet Secretary

iii. mechanisms are in place to identify and remove conflicts of interest prohibited under this Act.

(8)(A) The plan shall provide that no supportive services, nutrition services, or in-home services will be directly provided by the State agency or an area agency on aging in the State, unless, in the judgment of the State agency—

i. provision of such services by the State agency or the area agency on aging is necessary to assure an adequate supply of such services;
ii. such services are directly related to such State agency's or area agency on aging's administrative functions; or
iii. such services can be provided more economically, and with comparable quality, by such State agency or area agency on aging.

B. Regarding case management services, if the State agency or area agency on aging is already providing case management services (as of the date of submission of the plan) under a State program, the plan may specify that such agency is allowed to continue to provide case management services.

C. The plan may specify that an area agency on aging is allowed to directly provide information and assistance services and outreach.

6. The plan shall provide assurances that—

A. the State agency will carry out, through the Office of the State Long-Term Care Ombudsman, a State Long-Term Care Ombudsman program in accordance with section 712 and this title, and will expend for such purpose an amount that is not less than an amount expended by the State agency with funds received under this title for fiscal year 2019, and an amount that is not less than the amount expended by the State agency with funds received under title VII for fiscal year 2019; and

B. funds made available to the State agency pursuant to section 712 shall be used to supplement and not supplant other Federal, State, and local funds expended to support activities described in section 712.

7. The plan shall provide assurances that the special needs of older individuals residing in rural areas will be taken into consideration and shall describe how those needs have been met and describe how funds have been allocated to meet those needs.

8. The plan shall provide that with respect to legal assistance —

A. the plan contains assurances that area agencies on aging will (i) enter into contracts with providers of legal assistance which can demonstrate the experience or capacity to deliver legal assistance; (ii) include in any such contract provisions to assure that any recipient of funds under division (i) will be subject to specific restrictions and regulations promulgated under the Legal Services Corporation Act (other than restrictions and regulations governing eligibility for legal assistance under such Act and governing membership of local governing boards) as determined appropriate by the Assistant Secretary; and (iii) attempt to involve the private bar in legal assistance activities authorized under this title, including groups within the private bar furnishing services to older individuals on a pro bono and reduced fee basis;

B. the plan contains assurances that no legal assistance will be furnished unless the grantee administers a program designed to provide legal assistance to older individuals with social or economic need and has agreed, if the grantee is not a Legal Services Corporation project grantee, to coordinate its services with existing Legal Services Corporation projects in the planning and service area in order to concentrate the use of funds provided under this title on individuals with the greatest such need; and the area agency on aging makes a finding, after assessment, pursuant to standards for service promulgated by the Assistant Secretary, that any grantee selected is the entity best able to provide the particular services.

C. the State agency will provide for the coordination of the furnishing of legal assistance to older individuals within the State, and provide advice and technical assistance in the provision of legal assistance to older individuals within the State and support the furnishing of training and technical assistance for legal assistance for older individuals;

D. the plan contains assurances, to the extent practicable, that legal assistance furnished under the plan will be in addition to any legal assistance for older individuals being furnished with funds from sources other than this Act and that reasonable efforts will be made to maintain existing levels of legal assistance for older individuals; and

E. the plan contains assurances that area agencies on aging will give priority to legal assistance related to income, health care, long-term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination.

9. The plan shall provide, whenever the State desires to provide for a fiscal year for services for the prevention of abuse of older individuals —

A. the plan contains assurances that any area agency on aging carrying out such services will conduct a program consistent with relevant State law and coordinated with existing State adult protective service activities for—

i. public education to identify and prevent abuse of older individuals;
ii. receipt of reports of abuse of older individuals;
iii. active participation of older individuals participating in programs under this Act through outreach, conferences, and referral of such individuals to other social service agencies or sources of

assistance where appropriate and consented to by the parties to be referred; and

iv. referral of complaints to law enforcement or public protective service agencies where appropriate;

B. the State will not permit involuntary or coerced participation in the program of services described in this paragraph by alleged victims, abusers, or their households; and

C. all information gathered in the course of receiving reports and making referrals shall remain confidential unless all parties to the complaint consent in writing to the release of such information, except that such information may be released to a law enforcement or public protective service agency.

10. The plan shall provide assurances that each State will assign personnel (one of whom shall be known as a legal assistance developer) to provide State leadership in developing legal assistance programs for older individuals throughout the State.

11. The plan shall, with respect to the fiscal year preceding the fiscal year for which such plan is prepared—

A. identify the number of low-income minority older individuals in the State, including the number of low-income minority older individuals with limited English proficiency; and

B. describe the methods used to satisfy the service needs of the low-income minority older individuals described in subparagraph (A), including the plan to meet the needs of low- income minority older individuals with limited English proficiency.

12. The plan shall provide assurances that, if a substantial number of the older individuals residing in any planning and service area in the State are of limited
English-speaking ability, then the State will require the area agency on aging for each such planning and service area—

A. to utilize in the delivery of outreach services under section 306(a)(2)(A), the services of workers who are fluent in the language spoken by a predominant number of such older individuals who are of limited English-speaking ability; and

B. to designate an individual employed by the area agency on aging, or available to such area agency on aging on a full-time basis, whose responsibilities will include—

i. taking such action as may be appropriate to assure that counseling assistance is made available to such older individuals who are of limited English-speaking ability in order to assist such older individuals in participating in programs and receiving assistance under this Act; and

ii. providing guidance to individuals engaged in the delivery of supportive services under the area plan involved to enable such individuals to be aware of cultural sensitivities and to take into account effectively linguistic and cultural differences.

iii. The plan shall provide assurances that the State agency will require outreach efforts that will—identify individuals eligible for assistance under this Act, with special emphasis on -

iv. older individuals residing in rural areas;

v. older individuals with greatest economic need (with particular attention to low-
income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas);

vi. older individuals with greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas);

vii. older individuals with severe disabilities;

viii. older individuals with limited English-speaking ability; and

ix. older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and

B. inform the older individuals referred to in clauses (i) through (vi) of subparagraph (A), and the caretakers of such individuals, of the availability of such assistance.

13. The plan shall provide, with respect to the needs of older individuals with severe disabilities, assurances that the State will coordinate planning, identification, assessment of needs, and service for older individuals with disabilities with particular attention to individuals with severe disabilities with the State agencies with primary responsibility for individuals with disabilities, including severe disabilities, to enhance services and develop collaborative programs, where appropriate, to meet the needs of older individuals with disabilities.

14. The plan shall provide assurances that area agencies on aging will conduct efforts to facilitate the coordination of community-based, long-term care services, pursuant to section 306(a)(7), for older individuals who—

A. reside at home and are at risk of institutionalization because of limitations on their ability to function independently;

B. are patients in hospitals and are at risk of prolonged institutionalization; or

C. are patients in long-term care facilities, but who can return to their homes if community-based services are provided to them.

15. The plan shall include the assurances and description required by section 705(a).

16. The plan shall provide assurances that special efforts will be made to provide technical assistance to minority providers of services.

17. The plan shall—

A. provide an assurance that the State agency will coordinate programs under this title and programs under title VI, if applicable; and

B. provide an assurance that the State agency will pursue activities to increase access by older individuals who are Native Americans to all aging programs and benefits provided by the agency, including programs and benefits provided under this title, if applicable, and specify the ways in which the State agency intends to implement the activities.

18. If case management services are offered to provide access to supportive services, the plan shall provide that the State agency shall ensure compliance with the requirements specified in section 306(a)(8).

19. The plan shall provide assurances that demonstrable efforts will be made—

A. to coordinate services provided under this Act with other State services that benefit older individuals; and

B. to provide multigenerational activities, such as opportunities for older individuals to serve as mentors or advisers in child care, youth day care, educational assistance, at-risk youth intervention, juvenile delinquency treatment, and family support programs.

20. The plan shall provide assurances that the State will coordinate public services within the State to assist older individuals to obtain transportation services associated with access to services provided under this title, to services under title VI, to comprehensive counseling services, and to legal assistance.

21. The plan shall include assurances that the State has in effect a mechanism to provide for quality in the provision of in-home services under this title.

22. The plan shall provide assurances that area agencies on aging will provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care.

(27)(A) The plan shall include, at the election of the State, an assessment of how prepared the State is, under the State's statewide service delivery model, for any anticipated change in the number of older individuals during the 10-year period following the fiscal year for which the plan is submitted.

B. Such assessment may include—

i. the projected change in the number of older individuals in the State;

ii. an analysis of how such change may affect such individuals, including individuals with low incomes, individuals with greatest economic need, minority older individuals, older individuals residing in rural areas, and older individuals with limited English proficiency;

iii. an analysis of how the programs, policies, and services provided by the State can be improved, including coordinating with area agencies on aging, and how resource levels can be adjusted to meet the needs of the changing population of older individuals in the State; and

iv. an analysis of how the change in the number of individuals age 85 and older in the State is expected to affect the need for supportive services.

28. The plan shall include information detailing how the State will coordinate activities, and develop long-range emergency preparedness plans, with area agencies on aging, local emergency response agencies, relief organizations, local governments, State agencies responsible for emergency preparedness, and any other institutions that have responsibility for disaster relief service delivery.

29. The plan shall include information describing the involvement of the head of the State agency in the development, revision, and implementation of emergency preparedness plans, including the State Public Health Emergency Preparedness and Response Plan.

30. The plan shall contain an assurance that the State shall prepare and submit to the Assistant Secretary annual reports that describe—

A. data collected to determine the services that are needed by older individuals whose needs were the focus of all centers funded under title IV in fiscal year 2019;

B. data collected to determine the effectiveness of the programs, policies, and services provided by area agencies on aging in assisting such individuals; and

C. outreach efforts and other activities carried out to satisfy the assurances described in paragraphs (18) and (19) of section 306(a).

Sec. 308, PLANNING, COORDINATION, EVALUATION, AND ADMINISTRATION OF STATE PLANS

(b)(3)(E) No application by a State under subparagraph (A) shall be approved unless it contains assurances that no amounts received by the State under this paragraph will be used to hire any individual to fill a job opening created by the action of the State in laying off or terminating the employment of any regular employee not supported under this Act in anticipation of filling the vacancy so created by hiring an employee to be supported through use of amounts received under this paragraph.

Sec. 705, ADDITIONAL STATE PLAN REQUIREMENTS

a. ELIGIBILITY.—In order to be eligible to receive an allotment under this subtitle, a State shall include in the state plan submitted under section 307—

1. an assurance that the State, in carrying out any chapter of this subtitle for which the State receives funding under this subtitle, will establish programs in accordance with the requirements of the chapter and this chapter;
2. an assurance that the State will hold public hearings, and use other means, to obtain the views of older individuals, area agencies on aging, recipients of grants under title VI, and other interested persons and entities regarding programs carried out under this subtitle;
3. an assurance that the State, in consultation with area agencies on aging, will identify and prioritize statewide activities aimed at ensuring that older individuals have access to, and assistance in securing and maintaining, benefits and rights;
4. an assurance that the State will use funds made available under this subtitle for a chapter in addition to, and will not supplant, any funds that are expended under any Federal or State law in existence on the day before the date of the enactment of this subtitle, to carry out each of the vulnerable elder rights protection activities described in the chapter;
5. an assurance that the State will place no restrictions, other than the requirements referred to in clauses (i) through (iv) of section 712(a)(5)(C), on the eligibility of entities for designation as local Ombudsman entities under section 712(a)(5).
6. an assurance that, with respect to programs for the prevention of elder abuse, neglect, and exploitation under chapter 3—

A. in carrying out such programs the State agency will conduct a program of services consistent with relevant State law and coordinated with existing State adult protective service activities for—

i. public education to identify and prevent elder abuse;
ii. receipt of reports of elder abuse;
iii. active participation of older individuals participating in programs under this Act through outreach, conferences, and referral of such individuals to other social service agencies or sources of assistance if appropriate and if the individuals to be referred consent; and

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Emily Kaltenbach, Cabinet Secretary
Antoinette Vigil, Deputy Cabinet Secretary
Angelina Flores-Montoya, Deputy Cabinet Secretary

iv. referral of complaints to law enforcement or public protective service agencies if appropriate;

B. the State will not permit involuntary or coerced participation in the program of services described in subparagraph (A) by alleged victims, abusers, or their households; and

C. all information gathered in the course of receiving reports and making referrals shall remain confidential except—

i. if all parties to such complaint consent in writing to the release of such information;

ii. if the release of such information is to a law enforcement agency, public protective service agency, licensing or certification agency, ombudsman program, or protection or advocacy system; or

iii. upon court order…

Emily Kaltenbach
7/1/2025

Emily Kaltenbach, Cabinet Secretary | Date
Aging and Long-Term Services Department

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ATTACHMENT B
INFORMATION REQUIREMENTS

Except as indicated where optional or only applicable to States with multiple planning and service areas, the State Plan must illustrate how the following provision(s) will be met:

Greatest Economic and Greatest Social Need
45 CFR § 1321.27 (d) requires each State Plan must include a description of how greatest economic need and greatest social need are determined and addressed by specifying:

1. How the State agency defines greatest economic need and greatest social need, which shall include the populations set forth in the definitions of greatest economic need and greatest social need, as set forth in 45 CFR § 1321.3; and
2. The methods the State agency will use to target services to such populations, including how OAA funds may be distributed to serve prioritized populations in accordance with requirements as set forth in 45 CFR § 1321.49 or 45 CFR § 1321.51, as appropriate.

"*Greatest economic need*" means "the need resulting from an income level at or below the Federal poverty level and as further defined by State and area plans based on local and individual factors, including geography and expenses" (45 CFR § 1321.3).

"*Greatest social need*" means the need caused by the following noneconomic factors as defined in 45 CFR § 1321.3.

A State agency's response must establish how the State agency will:

1. identify and consider populations in greatest economic need and greatest social need;
2. describe how they target the identified the populations for service provision;
3. establish priorities to serve one or more of the identified target populations, given limited availability of funds and other resources;
4. establish methods for serving the prioritized populations; and
5. use data to evaluate whether and how the prioritized populations are being served.

RESPONSE:

The State of New Mexico has established the definitions for greatest economic need and greatest social need. ALTSD utilized this definition in its work.

New Mexico Administrative Code (9.2.1.7 NMAC Definitions)
"Greatest economic need" is need resulting from an income level at or below the federal poverty level.

"Greatest social need" is need caused by noneconomic factors which include physical and mental disabilities; language barriers; and cultural, social or geographical isolation, including isolation caused by racial or ethnic status, that restricts an individual's ability to perform normal daily tasks, or which threatens an individual's capacity to live independently.

A summary of statistical data indicating needs, to include target populations and documentation of the adequacy of the service delivery system in the planning and service area includes:

a. documented level of need for the service(s) requested;
b. service level being provided by area agency on aging service providers, including units of service, unduplicated number of persons being served, level of funding; and
c. any documented unmet need for the service.

Federally mandated priorities and preferences are implemented in accordance with the Older Americans Act (OAA). The most under-served counties will have priority under the OAA. Monitoring Area Agencies on Aging shall include an assessment of whether the program is performing all the functions, responsibilities and duties. Further, the department shall make reasonable requests for reports, including aggregated data regarding program activities, to meet the requirements of these provisions.

Area Agencies on Aging assess needs and develop Area Plans beginning with a needs assessment of quantitative factors. AAAs conduct an annual comparison of demographic information for the entire older adult population to those enrolled AAA services, by PSA and county. The purpose of this comparison is to ensure that providers within each PSA are providing services that represent the population of their service areas, and by extension, the scope of needs of that population.

Each Area Agency on Aging shall undertake a leadership role in assisting communities throughout the planning and service area to target resources to meet the needs of older individuals and family caregivers with greatest economic need and greatest social need, with particular attention to low-income minority individuals. Such activities may include location of services and specialization in the types of services most needed by these groups to meet this requirement. However, the area agency shall not permit a grantee or contractor under this part to employ a means test for services funded.

Native Americans: Greatest Economic and Greatest Social Need
45 CFR § 1321.27 (g):
Demonstration that the determination of greatest economic need and greatest social need specific to Native American persons is identified pursuant to communication among the State agency and Tribes, Tribal organizations, and Native communities, and that the services provided under this part will be coordinated, where applicable, with the services provided under Title VI of the Act and that the State agency shall require area agencies to provide outreach where there are older Native Americans in any planning and service area, including those living outside of reservations and other Tribal lands.

RESPONSE:

In response to the updated Older Americans Act Regulations, the Department through the Office of Indian Elder Affairs (OIEA) will develop a plan, that convenes the Tribes, Pueblos and Nations, other Tribal and non-tribal stakeholders including ALTSD relevant divisions, Area Agencies on Aging and service providers, to determine the greatest economic need and greatest social need specific to Native American persons. The elements of the plan will include:

- Establish common purpose and goals among the stakeholders
- Educating the stakeholders on specific aspects of the Tribes, Pueblos and Nations in New Mexico
- Educating the stakeholders on greatest economic and greatest social need
- Educating the stakeholders on services provided under the Older Americans Act, Title VI
- Educating the stakeholders on gaps and needs in Tribal communities through the OIEA AmeriCorps/Vista project.

Once the groundwork has been established during the first year of this State Plan on Aging cycle, there will be facilitated conversations to collectively determine the greatest economic need and greatest social need specific to Native American persons in New Mexico.

<u>Activities to Increase Access and Coordination for Native American Older Adults</u>

OAA Section 307(a)(21): The plan shall —

. . .

B. provide an assurance that the State agency will pursue activities to increase access by older individuals who are Native Americans to all aging programs and benefits provided by the agency, including programs and benefits provided under this title, if applicable, and specify the ways in which the State agency intends to implement the activities.

45 CFR § 1321.53:

a. For States where there are Title VI programs, the State agency's policies and procedures, developed in coordination with the relevant Title VI program director(s), as set forth in § 1322.13(a), must explain how the State's aging network, including area agencies and service providers, will coordinate with Title VI programs to ensure compliance with sections 306(a)(11)(B) (42 U.S.C. 3026(a)(11)(B)) and 307(a)(21)(A) (42 U.S.C. 3027(a)(21)(A)) of the Act. State agencies may meet these requirements through a Tribal consultation policy that includes Title VI programs.

b. The policies and procedures set forth in (a) of this provision must at a minimum address:

1. How the State's aging network, including area agencies on aging and service providers will provide outreach to Tribal elders and family caregivers regarding services for which they may be eligible under Title III and/or VII;
2. The communication opportunities the State agency will make available to Title VI programs, to include Title III and other funding opportunities, technical assistance on how to apply for Title III and other funding opportunities, meetings, email distribution lists, presentations, and public hearings;
3. The methods for collaboration on and sharing of program information and changes, including coordinating with area agencies and service providers where applicable;

4. How Title VI programs may refer individuals who are eligible for Title III and/or VII services;
5. How services will be provided in a culturally appropriate and trauma-informed manner; and
6. Opportunities to serve on advisory councils, workgroups, and boards, including area agency advisory councils, as set forth in § 1321.63.

RESPONSE:

The Aging and Long-Term Services Department through OIEA will utilize the before mentioned convening of New Mexico Tribes, Pueblos and Nations, other Tribal and non-tribal stakeholders including ALTSD relevant divisions, Area Agencies on Aging, and local service providers to not only establish the greatest economic need and greatest social need for Native American persons, but to work together to help inform the development of ALTSD's policies and procedures on the following:

1. Coordination of Title III and the Tribes, Pueblos and Nations in New Mexico including the OAA funded Title VI grantees.
2. Establish culturally appropriate outreach methods to increase access to all Older Americans Act funded services.
3. Solidify the operating procedures for effective communication from ALTSD through OIEA to the Tribes, Pueblos and Nations including the Title VI grantees, to include Title III and other funding opportunities, technical assistance on how to apply for Title III and other funding opportunities, meetings, email distribution lists, presentations, and public hearings;
4. Establish methods for collaboration on and sharing of program information and changes, including coordinating with area agencies and service providers;
5. Institute a culturally appropriate referral system/method for the Tribes, Pueblos and Nations, including the Title VI grantees to easily, without barrier, gain information and access to all Older Americans Act services;
6. Develop and implement training on how to provide services in culturally appropriate and trauma-informed manner; and
Establish minimum standards for Tribal participation on advisory councils, workgroups, and boards, including area agency advisory councils, as set forth in § 1321.63.

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Collaborative efforts have been conducted at the AAA level with the Office of Indian Elder Affairs and are Title VI programs on statewide aging network legislative matters. In AAA service areas, coordination of services is done locally, by programs identifying ways to collaborate and support each other. Title VI programs are given the opportunity to apply for Title III funding through a Request for Proposals (RFP) offered through the AAAs. RFP information was shared with the Office of Indian Elder Affairs at ALTSD, as well as with individual Tribes and Pueblos. Training on the application process and specific requirements is offered, recorded, and made available to Title VI programs. AAAs will continue to work with are Title VI programs so that they become more familiar with Title III funding opportunities.

The ALTSD continues actively pursuing activities to increase access by older individuals who are Native Americans to all aging programs and benefits provided by the Department. ALTSD is working in collaboration with the AAAs and the OAA funded Title VI Programs facilitating better Title III / VI coordination to expand services and access to New Mexico's Native American older adults and caregivers. The New Mexico AAAs will expand Title III services to the Tribes and Pueblos by contracting with Title VI Programs.

Low Income Minority Older Adults
OAA Section 307(a)(14):
(14) The plan shall, with respect to the fiscal year preceding the fiscal year for which such plan is prepared—

A. identify the number of low-income minority older individuals in the State, including the number of low-income minority older individuals with limited English proficiency; and
B. describe the methods used to satisfy the service needs of the low-income minority older individuals described in subparagraph (A), including the plan to meet the needs of low- income minority older individuals with limited English proficiency.

RESPONSE:

There are 49,709 low-income, minority older New Mexicans.
The Intrastate Funding Formula is specifically designed to ensure that funding is allocated to satisfy the service needs of low-income, minority older New Mexicans. Low-income and minority are weighted factors in formula at 13% and 10% respectively.

The Area Agencies on Aging shall undertake a leadership role in assisting communities throughout the planning and service area to target resources from all appropriate sources to meet the needs of older individuals and family caregivers with the greatest economic need and greatest social need, with particular attention to low-income minority individuals. Such activities may include location of services and specialization in the types of services most needed by these groups to meet this requirement.

Rural Areas—Hold Harmless
OAA Section 307(a)(3):
The plan shall—

B. with respect to services for older individuals residing in rural areas—

i. provide assurances the State agency will spend for each fiscal year not less than the amount expended for such services for fiscal year 2000;
ii. identify, for each fiscal year to which the plan applies, the projected costs of providing such services (including the cost of providing access to such services); and
iii. describe the methods used to meet the needs for such services in the fiscal year preceding the first year to which such plan applies.

RESPONSE:

Approximately 25% of New Mexico's population lives in rural areas. The SUA has incorporated a rural component into its Interstate Funding Formula to ensure funding for rural areas of New Mexico are consistent based on the Older Americans Act. Assuming flat funding, appropriation associated with the rural population will be:

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Federal Fiscal Year	PSA 1	PSA 2	PSA 3	PSA 4	PSA 5	PSA 6	Total Funding Associated with Rural Populations
2026	$11,703.60	$372,859.62	$692,463.29	$489,907.01	$-	$-	$1,566,933.52
2027	$10,588.50	$301,084.76	$626,486.12	$443,229.18	$-	$185,544.96	$1,566,933.52
2028	$10,588.50	$301,084.76	$626,486.12	$443,229.18	$-	$185,544.96	$1,566,933.52
2029	$10,588.50	$301,084.76	$626,486.12	$443,229.18	$-	$185,544.96	$1,566,933.52

IFF Weights	**IFF Factors**	**Metro Area Agency on Aging**	**Non-Metro AAA**	**Non-Metro AAA**	**Non-Metro AAA**	**PSA 5 Navajo Nation - Funds distributed through the Tri-State Agreement, funds not accounted for in the IFF**	**Indian Area Agency on Aging *Note: the IAAA will NOT be receiving funds until FFY 2027**	
		PSA 1	**PSA 2**	**PSA 3**	**PSA 4**		**PSA 6**	**Total**
60.00%	60+	$1,718,529.91	$2,118,123.30	$691,970.34	$1,001,730.05		$-	$5,530,353.60
17.00%	60+ Rural	$10,588.50	$301,084.76	$626,486.12	$443,229.18		$185,544.96	$1,566,933.52
13.00%	poverty (65+)	$364,060.20	$447,439.94	$149,909.98	$236,833.17		$-	$1,198,243.28
10.00%	minority	$253,209.26	$356,532.73	$91,597.26	$157,180.16		$107,450.54	$965,969.94
100.00%	Total	$2,346,387.86	$3,223,180.72	$1,559,963.70	$1,838,972.57		$292,995.49	$9,261,500.34
	Previous Funding Distribution	$2,079,281.00	$2,941,454.00	$1,563,933.00	$1,774,586.00			$8,359,254.00
	Variance	$267,106.86	$281,726.72	$(3,969.30)	$64,386.57		$292,995.49	$902,246.34
	% of Funding	25.33%	34.80%	16.84%	19.86%		3.16%	100.00%

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NMAC 9.2.14.10 DEPARTMENT RESPONSIBILITIES: The department shall:

1. Allocate funds appropriated by the state legislature:
    a. To current contractors to maintain or enhance levels of operation; and
    b. Expand services based on determined need; and
    c. Contract with new organizations to the extent that funds are available - 307(a)(3)(B)(ii)

Updated IFF

PSA	Population	60+	60+ Rural	60+ Below Poverty (65+)	60+ Minorities	Number of Counties
1	672,508	163,620	1,032	15,103	72,446	1
2	757,080	201,665	29,345	18,562	102,008	13
3	302,780	65,882	61,060	6,219	26,207	11
4	380,976	95,374	43,199	9,825	44,971	8
5	40,906	*	*	*	*	0
6	79,827	*	18,084	*	18,084	21
Total	**2,234,077**	**526,541**	**152,720**	**49,709**	**263,716**	33

(iii) describe the methods used to meet the needs for such services in the fiscal year preceding the first year to which such plan applies.

Performance Measures and Strategies

1. Increase the percentage of older New Mexicans receiving congregate, and home delivered meals through aging network programs that are assessed with "high" nutritional risk. This will be accomplished through strategies that include:
    a. Implementing New Mexico Grown local sourced foods into senior meal site programming
    b. Collaborating with the New Mexico Health Care Authority
    c. Targeting at-risk older adults to improve their nutrition status
    d. Conducting more outreach activities
    e. Utilizing data and analytics
2. Grow the number of hours of service provided by senior volunteers statewide, this will be completed by implementing the following strategies:
    a. Increasing the number of participating volunteers and volunteer opportunities

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b. Engaging more older adults during intentional outreach events on volunteer opportunities
c. Adding volunteer opportunities through innovative initiatives such as; a volunteer driver program and a care companion program

3. Expand the number of outreach events and activities to identify, contact, and provide information about aging network services to potential aging network consumers who may be eligible to access senior services but are not currently accessing those services. The mechanism for implementing strategies focuses on the following:
   a. Enlarging the number of potential older adult consumers who receive information about aging network services through the Area Agencies on Aging and ALTSD
   b. Expanding data analysis process to further target outreach accurately
   c. Increasing the number of meals served in congregate and home delivered settings
      to combat food insecurity and improve chronic health conditions
      The series of strategies to accomplish these goals include:
      i. Conducting monthly promotion of nutritional services by the AAAs and local service providers that focus on underserved areas
      ii. Coordinating with community health providers to identify older adults who do not access services
      iii. Collaborating with other state departments on food security initiatives to—identify underserved populations such as Veterans, older relative caregivers (grandparents raising grandchildren), caregivers of older adults, and the unhoused older adult population
      iv. Increasing the providers using the New Mexico Grown program—locally sourced foods to elevate quality of meals served at senior centers
      v. Expanding access by identifying alternative meal sites for rural and food desert areas
      vi. Establishing a committee with the SUA and AAAs to analyze senior nutrition service delivery which adheres to the OAA regulations, senior nutrition education and dietary guidelines
      vii. Developing an emergency implementation plan with the SUA, AAAs, and local service providers coordinate the distribution of emergency meals during times of power outages, flooding, wildfires, and other natural disasters
      viii. Expanding targeted outreach
      ix. Identifying and coordinating with new partners

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x.Forming and enacting a Senior Nutrition Committee

4. Increase the number of transportation units provided through:
    a. Implementing innovative and alternative transportation options for consumers that across neighboring state lines, when appropriate
5. Increase the number of hours of caregiver support, including homebased services by:
    a. Adding service providers in identified service gap areas
    b. Administering the universal consumer information tool (UCIT) to standardize the consumer assessment process across the State
    a. Implementing more case management services through the Area Agencies on Aging.
6. Legal services: legal assistance/guidance on senior related issues and assistance with application appeal process and civil claims.

Rural Areas – Needs and Fund Allocations
OAA Section 307(a)(10):
The plan shall provide assurance that the special needs of older individuals residing in rural areas are taken into consideration and shall describe how those needs have been met and describe how funds have been allocated to meet those needs.

RESPONSE:

The goals and objectives outlined in this State Plan on Aging detail the provision of services to the older population in New Mexico. Specifics are given regarding Information and Assistance, Outreach, Congregate Meals, Home-Delivered Meals, Nutrition Education, Transportation, Assisted Transportation, Caregiver Support Services, Evidence-based Health Promotion and Disease Prevention Programs, and many others. Each of these objectives includes specific performance measures and reporting dates. All of these services are provided with the funds allocated based on the Intrastate Funding Formula, outlined below. This formula has rurality as a heavily weighted factor at 17%. In addition, objectives are included in this plan to assure that Title VI providers, New Mexico's Tribes, Pueblos, and Nations, are consulted on a regular basis, and have equal access to application for Title III funding through the Request for Proposals (RFP) processes implemented by each AAA. These providers are all in rural areas, so this effort contributes to services to New Mexico's older, rural population.

Assistive Technology
OAA Section 306(a)(6)(I):
Describe the mechanism(s) for assuring that each Area Plan will include information detailing how the area agency will, to the extent feasible, coordinate with the State agency to disseminate information about the State assistive technology entity and access to assistive technology options for serving older individuals;

RESPONSE:

AAAs are working toward providing services directly to homebound seniors for technology in the home, assistive technology devices and services.

ALTSD collaborates with the State of New Mexico Governor's Commission on Disability/New Mexico Technology Assistance Program to assist older New Mexicans with disabilities get the assistive technology information and services they need through:

- Assisting individuals to access short-term assistance services through an internal referral process.
- ALTSD's Short-Term Assistance (STA) program and offering short-term assistance through State Health Insurance Assistance Program (SHIP) Regional Coordinators
- Assisting consumers in obtaining services such as Medicaid, Medicare, home modifications, and meals that allow them to remain in the community.

Minimum Proportion of Funds
OAA Section 307(a)(2):
The plan shall provide that the State agency will —…

C. *specify a minimum proportion* of the funds received by each area agency on aging in the State to carry out part B that will be expended (in the absence of a waiver under sections 306 (c) or 316) by such area agency on aging to provide each of the categories of services specified in section 306(a)(2). *(Note: those categories are access, in-home, and legal assistance. Provide specific minimum proportion determined for each category of service.)*

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Angelina Flores-Montoya, Deputy Cabinet Secretary

RESPONSE:

The SUA requires each area agency on aging to expend a minimum percentage of part B funding for access, in-home and legal assistance services. (See Section F. of the Intrastate Funding Formula.)

The Department has established the following minimum percentages for priority services:

- Access Services: 20%
- In-Home Services: 8%
- Legal Assistance: 6%

Assessment of Statewide Service Delivery Model
OAA Section 307(a)(27):

A. The plan shall include, at the election of the State, an assessment of how prepared the State is, under the State's statewide service delivery model, for any anticipated change in the number of older individuals during the 10-year period following the fiscal year for which the plan is submitted.

Such assessment may include—

i. the projected change in the number of older individuals in the State;
ii. an analysis of how such change may affect such individuals, including individuals with low incomes, individuals with greatest economic need, minority older individuals, older individuals residing in rural areas, and older in-dividuals with limited English proficiency;
iii. an analysis of how the programs, policies, and services provided by the State can be improved, including coordinating with area agencies on aging, and how resource levels can be adjusted to meet the needs of the changing population of older individuals in the State; and
iv. an analysis of how the change in the number of individuals age 85 and older in the State is expected to affect the need for supportive services

RESPONSE:

New Mexico's older adult population is expected to continue to grow, but the state's overall population growth is projected to decline.

Growth rate estimates:

- The University of New Mexico's Geospatial and Population Studies Department projects that the population over 65 will grow by over 80,000 people between 2020 and 2040.

- The U.S. Census Bureau estimates that more than 30% of New Mexico's population will be over 60 by 2030.
- UNM-GPS projects that the population over 65 will account for nearly 23% of New Mexico's population by 2040.

Aging population:

- The number of New Mexicans aged 85 and older is expected to more than double over the next 20 years.

Income levels:

- The median income for New Mexico seniors is lower than the median income for other age groups.
- In 2022, the median income for New Mexico households with a senior as the main householder was $50,240.

Poverty:

- New Mexico has high poverty rates and low-income levels across its population.

As a direct result of an assessment of the New Mexico statewide service delivery model, the OAA Section 307(a)(8)(A), (B), and (C), the Department required that the Area Agencies on Aging respond to Area Plan Guidance regarding the direct provision of services. The Area Plans have been approved and meet all of the requirements outlined in the OAA and regulations. Due to significant gaps in case management in underserved areas throughout the state, PSAs 2, 3 and 4 provide this service directly. ALTSD through its implementation of the ADRC, provide information and assistance, and outreach. The IAAA also directly provides outreach directly to the New Mexico Tribes, Pueblos and Nations.

Shelf Stable, Pick-Up, Carry-Out, Drive-Through, or Similar Meals Using Title III Congregate Nutrition (C-1) Service Funding (Optional, only for States that elect to pursue this activity)

45 CFR § 1321.87(a)(1)(ii):

Title III C-1 funds may be used for shelf-stable, pick-up, carry-out, drive-through, or similar meals, subject to certain terms and conditions:

A. Such meals must not exceed 25 percent of the funds expended by the State agency under Title III, part C-1, to be calculated based on the amount of Title III, part C-1 funds available after all transfers as set forth in 45 CFR § 1321.9(c)(2)(iii) are completed;

B. Such meals must not exceed 25 percent of the funds expended by any area agency on aging under Title III, part C-1, to be calculated based on the amount of Title III, part C-1 funds available after all transfers as set forth in 45 CFR § 1321.9(c)(2)(iii) are completed;

(iii) Such meals are to be provided to complement the congregate meal program:

A. During disaster or emergency situations affecting the provision of nutrition services;

B. To older individuals who have an occasional need for such meal; and/or

(C)To older individuals who have a regular need for such meal, based on an individualized assessment, when targeting services to those in greatest economic need and greatest social need; and

45 CFR § 1321.27 (j):

If the State agency allows for Title III, part C-1 funds to be used as set forth in §1321.87(a)(1)(i), the State agency must include the following:

1. Evidence, using participation projections based on existing data, that provision of such meals will enhance and not diminish the congregate meals program, and a commitment to monitor the impact on congregate meals program participation;
2. Description of how provision of such meals will be targeted to reach those populations identified as in greatest economic need and greatest social need;
3. Description of the eligibility criteria for service provision;
4. Evidence of consultation with area agencies on aging, nutrition and other direct services providers, other stakeholders, and the general public regarding the provision of such meals; and
5. Description of how provision of such meals will be coordinated with area agencies on aging, nutrition and other direct services providers, and other stakeholders.

RESPONSE:

The Area Agencies on Aging have requested flexibility to allow up to 25 percent of Title III, part C-1 funds to be used as set forth in § 1321.87(a)(1)(i) through (iii) to provide shelf-stable, pick- up, carry-out, drive-through, or similar meals to complement the Congregate Nutrition program.

The AAAs will start small in targeted locations, implement policies and monitor utilization to ensure the availability of Grab and Go Nutrition does not negatively impact the Congregate Nutrition program.

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ENHANCE NUTRITION: The AAAs will develop policies and procedures regarding Grab and Go nutrition options to ensure such meals will enhance and not diminish the Congregate Nutrition program.

The AAAs will locate Grab and Go sites separate from Congregate Meal sites with the intent to expand the consumer population to those who will are not likely to otherwise participate. Consumer eligibility targets will be established for providers and community partners to utilize before offering Grab and Go meals.

Grab and Go providers will post and include information encouraging consumers to attend a meal site, including transportation options, center locations, and activities.

The impact will be monitored by the AAAs and the SUA including if the Grab and Go meals may have on Congregate Meals program participation and consumers, and should a negative impact arise will implement corrective actions.

TARGETED: The Grab and Go meals will be targeted to focus on serving consumers in the greatest economic and greatest social need.

The AAAs will work with providers to locate Grab and Go sites in high density age 60 and older poverty areas, and in locations such as health centers serving seniors where consumers can be identified as being in the greatest need.

The AAAs will offer Grab and Go meals for identified clients at targeted sites and may offer to drop off to certain individuals. Providers and partners may be engaged to "prescribe" a set of five to ten frozen meals matched according to identified food insecurity and medical needs. At health centers serving seniors with appropriate freezers, meals may be given to the consumer to take home in real time at the end of their visit. Subsequent meals could be picked up by the consumer every other week until the quantity of the prescription is fulfilled. This model aligns with the Food as Medicine movement.

ELIGIBILITY: The Area Agencies on Aging will develop Grab and Go eligibility policies and procedures including current NSIP criteria with a focus on serving consumers in the greatest economic need and greatest social need not participating in Congregate or Home Delivered Nutrition programs. The Universal Consumer Information Tool (UCIT) nutrition scores may be utilized by providers to target individuals with high nutritional risk.

The policies and procedures will include eligibility based on 1321.87(a)(1)(iii):

- During disaster or emergency situations affecting the provision of nutrition services;
- To older individuals who have an occasional need for such meal; and/or
- To older individuals who have a regular need for such meal, based on an individualized assessment, when targeting services to those in greatest economic need and greatest social need.

CONSULTATION: The AAAs met with current nutrition providers in November 2024 regarding the opportunity to provide Grab and Go meals. Providers were offered the opportunity to make recommendations and share concerns. The AAAs will continue to gather feedback prior to the implementation in FY2026.

COORDINATION: The AAAs will engage providers regularly to monitor Grab and Go service delivery coordination with other nutrition programs. Other aging network service providers will be trained regarding Grab and Go eligibility criteria, and how to refer eligible individuals for service.

Funding Allocation – Ombudsman Program

45 CFR Part 1324, Subpart A:
How the State agency will coordinate with the State Long-Term Care Ombudsman and allocate and use funds for the Ombudsman program under Title III and VII, as set forth in 45 CFR part 1324, subpart A.

RESPONSE:

Responsive to the OAA Updated Regulations OAA Updated Regulations (1324) for coordinating the strategic allocation of state and federal funds to support the Ombudsman program, will work to expand communication plans and meeting frequency across all ALTSD agencies and functional partners within the Health Care Authority.

The Ombudsman program will coordinate and promote the development of citizen organizations that align with the resident interests.

The Ombudsman program will provide technical support for the development of and ongoing support as requested by resident and family councils to protect the rights and well-being of residents.

Additionally, the Ombudsman program will develop and share communication protocols and procedures for sharing appropriate information and input regarding facility and long-term care provider licensure and certification programs. Such work may require the development of memoranda of understanding or other agreements between the Ombudsman program and AAA programs, the ADRC, APS programs, protection and advocacy programs within the State established under the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (43 U.S.C. 15001 et seq), the State Medicaid fraud control unity, victim assistance programs, State and local law enforcement agencies, courts of competent jurisdiction, and the State Legal Assistance Developer as provided under section 731 of the Act (42 U.S. C 3058).

The plan includes expanded collaborative efforts with the AAA programs to strengthen Ombudsman initiatives, including shared training programs, when applicable, and shared efforts related to broadening the volunteer programs.

Funding Allocation – Elder Abuse, Neglect, and Exploitation

45 CFR § 1321.27 (k):
How the State agency will allocate and use funds for prevention of elder abuse, neglect, and exploitation as set forth in 45 CFR part 1324, subpart B.

RESPONSE:

As required under 45 C.F.R. § 1321.27(k), the New Mexico Aging and Long-Term Services Department (ALTSD) will allocate and use funds to prevent elder abuse, neglect, and exploitation in compliance with 45 C.F.R. part 1324, subpart B.
1. Funding Distribution & Targeted Initiatives

ALTSD will distribute funds across core prevention, detection, and intervention strategies to ensure an effective response to elder abuse, neglect, and exploitation. This includes:

- Adult Protective Services (APS) Expansion
  - Expand APS staffing and case management services, ensuring timely investigations and follow-ups.
  - Increase in APS regional presence to reduce response times and enhance accessibility for vulnerable older adults.
  - Enhanced training for APS investigators on risk assessment, trauma-informed care, and financial exploitation detection.
- Elder Financial Exploitation Task Force

- Partnerships with financial institutions to train professionals on recognizing and reporting elder financial exploitation.
- Increased collaboration with law enforcement agencies to investigate and prosecute financial abuse cases.

- Elder Abuse Awareness and Prevention.
  - Collaboration with ALTSD External Affairs to establish public awareness campaigns targeting older adults, caregivers, and service providers to educate them on recognizing and reporting abuse.

2. Multi-Disciplinary Coordination & Compliance

To ensure statewide compliance with federal elder protection mandates, ALTSD will strengthen its collaborative framework:

- Cross-Agency Elder Protection Task Force
  - Collaboration between APS, law enforcement, healthcare providers, and financial institutions to improve abuse reporting and intervention.
  - Development of standardized reporting and response protocols across agencies for elder abuse cases. (Example: Joint Protocol)
- Legal Assistance & Case Prosecution Support
  - Continue collaborating with legal assistance programs to provide legal support to victims of elder abuse.
  - Increased collaboration with the New Mexico Attorney General's Office to coordinate efforts on unlicensed group home and Medicaid fraud.
  -

3. Data-Driven Prevention & Response Strategies

To improve elder abuse prevention and response, ALTSD-APS will adopt data-driven decision-making tools and measurable performance outcomes:

- Investment in the WellSky System Data Analytics
- Implementation of enhanced tracking mechanisms to improve APS case documentation, intervention timing, and service follow-up.
- Work within WellSky system capabilities to integrate advanced evaluation and analytical tools for better risk assessment and service planning.
- Performance & Compliance Metrics
  - Reduce repeated elder abuse incidents by 5% annually through intervention programs.
  - Improve APS case resolution efficiency by 10% through optimized workflows and process improvements.
  - Increase public reporting of elder abuse cases through expanded outreach and accessibility improvements.

4. Public Awareness, Outreach & Professional Training
Public education and professional training are critical to preventing elder abuse. ALTSD will create campaign efforts:

- Statewide Elder Abuse Awareness Campaigns
  - Expansion of "Recognize, Report, Prevent" awareness programs in New Mexico.
  - Dissemination of educational materials in multiple languages to reach diverse communities.
- Elder Justice Training for ICW/ICWS and staff
  - Training for APS staff, healthcare workers, and law enforcement on identifying and responding to elder abuse cases.
  - Financial exploitation detection training for financial professionals to enhance fraud prevention efforts.

Monitoring of Assurances
45 CFR § 1321.27 (m):
Describe how the State agency will conduct monitoring that the assurances (submitted as Attachment A of the State Plan) to which they attest are being met.

RESPONSE:
The Department monitors its contractors on a regular basis, at least annually. The standardized monitoring tool includes measures to assess compliance with the Older Americans Act assurances. The Department also requires that the Area Agencies on Aging sign applicable OAA assurances as part of the area plan process.

State Plans Informed By and Based on Area Plans
45 CFR § 1321.27 (c):
Evidence that the State Plan is informed by and based on area plans, except for single planning and service area States.

RESPONSE:
Area Plans offered localized solutions and strategies that complement the state's broader goals, ensuring that services are effectively tailored to different regions. The Area Plan Development Guidance can be found in Attachment I.

Public Input and Review

RESPONSE:
Public comment facilitated a democratic and inclusive process, allowing stakeholders to share their insights and concerns.

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Program Development and Coordination Activities (Optional, only for States that elect to pursue this activity)
45 CFR § 1321.27 (h):

Certification that any program development and coordination activities shall meet the following requirements:

1. The State agency shall not fund program development and coordination activities as a cost of supportive services under area plans until it has first spent 10 percent of the total of its combined allotments under Title III on the administration of area plans;
2. Program development and coordination activities must only be expended as a cost of State Plan administration, area plan administration, and/or Title III, part B supportive services;
3. State agencies and area agencies on aging shall, consistent with the area plan and budgeting cycles, submit the details of proposals to pay for program development and coordination as a cost of Title III, part B supportive services to the general public for review and comment; and
4. Expenditure by the State agency and area agency on program development and coordination activities are intended to have a direct and positive impact on the enhancement of services for older persons and family caregivers in the planning and service area.

RESPONSE:

New Mexico is choosing not to pursue this activity.

Legal Assistance Developer
45 CFR § 1321.27 (l):
How the State agency will meet responsibilities for the Legal Assistance Developer, as set forth in part 1324, subpart C.

RESPONSE:

The State Unit on Aging, the Aging and Long-Term Services Department (ALTSD), has designated a member of ALTSD's Assistant General Counsel as its State Legal Assistance Developer. The Legal Assistance Developer meets the requirements outlined in 45 CFR § 1324.303(c) and (d). ALTSD maintains capacity for coordinating legal assistance by entering into agreements with the area agencies on aging that service PSA 1-4. Legal assistance for PSA 5-6 is coordinated by ALTSD.

The City of Albuquerque/Bernalillo County Area Agency on Aging serves PSA 1 and contracts with the Senior Citizen Law Office (SCLO) to provide legal assistance. The North Central New Mexico Economic Development District Area Agency on Aging serves PSA 2-4 and contracts with New Mexico Legal Aid (New Mexico Legal Aid) to provide legal assistance. ALTSD contracts with the Legal Resources for the Elderly Program (LREP) helpline, a New Mexico Bar Association program, to provide legal assistance to PSAs 5 and 6, as well as any older adults throughout the state who are unable to access legal assistance from SCLO or New Mexico Legal Aid. All legal assistance providers are required to prioritize older adults with the greatest economic or social needs when providing legal assistance.

The Legal Assistance Developer will ensure that ALTSD maintains the capacity necessary to provide the AAAs, legal service providers, and all ALTSD divisions with technical assistance, training, and any other supportive function needed to comply with the Older American Act requirements to provide legal assistance. This includes utilization of resources provided by the National Center on Law and Elder Rights.

The Legal Assistance Developer will ensure that legal service providers promote financial management services to older individuals at risk of guardianship, conservatorship, or other fiduciary proceedings by requiring that this service is included in any contracts with legal service providers. The Legal Assistance Developer will also require that any contract with a legal service provider includes the requirement that older individuals be assisted in understanding their rights, exercising choices, benefitting from services and opportunities authorized by law, and maintaining the rights of older individuals at risk of guardianship, conservatorship, or other fiduciary proceedings.

The Legal Assistance Developer will engage in regular meetings with AAAs and legal service providers, and the Legal Assistance Developer will facilitate discussions on how best to improve the quality and quantity of legal services provided to older individuals.

Emergency Preparedness Plans – Coordination and Development
OAA Section 307(a)(28):
The plan shall include information detailing how the State will coordinate activities, and develop long-range emergency preparedness plans, with area agencies on aging, local emergency response agencies, relief organizations, local governments, State agencies responsible for emergency preparedness, and any other institutions that have responsibility for disaster relief service delivery.

RESPONSE:

The SUA coordinates with the New Mexico Department of Homeland Security and Emergency Management in addressing emergent situations for the New Mexico older adult population, participating in regular regional meetings and including the Area Agencies on Aging and direct service providers. The SUA in coordination with the Area Agencies on Aging and direct service providers implement safety checks with local authorities and conducting wellness calls.

Area Agencies on Aging:

City of Albuquerque/Metro AAA
City of ABQ. Bern. Co. AAA policies and procedures FY26 update include eligibility based on 1321.87(a)(1)(iii):

(A) During disaster or emergency situations affecting the provision of nutrition services;
(B) To older individuals who have an occasional need for such meal; and/or
(C) To older individuals who have a regular need for such meal, based on an individualized assessment, when targeting services to those in greatest economic need and greatest social need.
Other approved FY25 and state general funded service expansions include the shelf-stable emergency meals/senior food boxes.

North Central New Mexico Economic Development District/ Non-Metro AAA
Emergency Response Plan includes:
During the 2023-2026 Area Plan period, NMAAA is adapting to more frequent and serious emergency events due to climate change and other factors. As a result, we are working with providers to transition from more traditional "contingency" plans to more thorough emergency plans. NMAAA is also leveraging its resources as a council of governments which currently employs two emergency management professionals through U.S. Economic Development Administration funding. NMAAA will use these employees to improve provider training and use of best practices during the course the Plan.

<u>Service Continuity</u>
In Section IV, Number 400 and 401 of the Non-Metro Area Agency on Aging Policies and Procedures, as well as Section 2.A.4. Terms of agreement of all subrecipient contracts, subrecipient providers are required to inform NMAAA of the status of the consumers who are served through the program. The

provider is required to submit annually an updated contingency and emergency preparedness plan that includes working with local emergency managers in their planning and service area to assess those in need and locate emergency resources. Specifically, the plan must address:

- What alternative plans are in place for delivering services to consumers?
- If inclement weather is expected, how far in advance will consumers be notified of changes in service delivery?
- If inclement weather is expected, how far in advance will meals be delivered to home delivered consumers?
- What agencies (i.e. Cities, Counties, Red Cross, etc.) will the program work with during severe emergencies?

In FY 2023, NCNMEDD required a list of updated emergency contact information for each program, as well as the wellness check script that will be used by the program.

Policies and Procedures Section IV also requires providers to contact the NMAAA about a closure or emergency as soon as it is reasonable to do so and should include a plan for delivering meals and conducting welfare checks/calls. The provider should use any means available to relay the information to NMAAA so that information regarding closures can then be sent via email to ALTSD. NMAAA currently provides information regarding closures weekly in a report to ALTSD.

If a subrecipient provider reports an emergency that may result in a closure or modification of services, NMAAA helps within its staffing and budgetary capabilities to ensure continued service delivery. Such assistance includes identifying and coordinating alternative sites from which to prepare and distribute meals, securing self-stable meals and/or food boxes, conducting wellness checks, and distributing food and/or supplies.

Individuals with Functional Needs

Subrecipient contractors work with local emergency management teams to identify individuals with functional needs within their respective communities. These individuals can be identified using the Access and Functional Needs Toolkit created by the CDC, which will allow subrecipient providers to integrate a community partner network to communicate effectively during an emergency. In an emergency providers can reach out to consumers they are currently providing services to assess the need for emergency services and share their list of consumers who may have access and functional needs, while emergency management officials can refer other community members to providers for services they may be in need of, such as emergency nutrition services.

NMAAA's Role in Emergency Situations

NMAAA follows the universally accepted "all hazards" approach to emergency preparedness and response planning which includes four elements: 1) Communication; 2) Preparedness; 3) Training/Education; and 4) Information Management. Organized by these elements, our role in emergency situations is outlined below:

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	Role of Non-Metro AAA	**Mechanisms**
Preparedness	Designate an Emergency Coordinator at NMAAA to oversee planning and preparedness tasks and coordinate with emergency management in the appropriate jurisdiction. Require Emergency and Contingency Plans for all providers. Require provider training on emergency preparedness and Emergency and Contingency Plans. *Frequency: Annual and as needed*	• NMAAA policies • Annual contract requirements • NMAAA review of provider • Emergency and Contingency plans
Training & Education	Provide annual NMAAA staff and provider training on emergency preparedness and review of Emergency and Contingency Plans. Provide educational and informational resources to providers, including materials for distribution to older adults, adults with disabilities, and community members with functional needs. *Frequency: Annual and as needed*	• In-person and web-based training sessions • Printed and online training materials • Wellness call scripts • Informational brochures and flyers
Communication	Notify and update providers on emergency conditions, contacts and protocols. Distribute emergency advisories, orders and guidance. Advise providers on best practices for specific emergency situations. Provide technical assistance to providers as needed. *Frequency: Ongoing*	• Constant Contact messages and emails • Phone calls/videoconferences. • Web-based resources such as the American Red Cross • On-site technical assistance

	Role of Non-Metro AAA	Mechanisms
Information Management	Maintain file of Emergency Management and Contingency Plans. Maintain up-to-date list of provider emergency contact personnel. Document wellness calls and consumer data. Track emergency expenditure requests from providers and NMAAA, if submitted as Title III reimbursements. *Frequency: Ongoing*	• Excel spread Sheets • WellSky data base • NCNMEDD accounting system (MIP Abila)
Service Continuity	Assist with modified Nutrition service delivery, including identification of alternative meal sites, coordination with private vendors, and delivery of food boxes and shelf stable meals. Ensure welfare providers and emergency managers conduct checks. Welfare checks should include the assessment of food, water, heating and cooling, support network, functional needs, and durable medical equipment and medication. Assist in obtaining and/or delivering emergency funding, supplies and equipment as needed. *Frequency: Ongoing*	• Coordination of local resources, providers, emergency managers, community organizations, and private vendors • NMAAA policies • Annual contract requirements • Referrals to relief agencies and emergency responders • Calls and check-ins with providers

Emergency Coordination

In terms of compliance with emergency orders and protocols, Non-Metro AAA will follow the lead of the jurisdiction in which the emergency occurs, whether that be federal, state, or local.

For a federal emergency, NMAAA will interface directly with state agencies serving as the conduit with the federal government. It is assumed that the New Mexico Department of Homeland Security or the Aging and Long-Term Services Department (ALTSD) would serve as the lead agency. NMAAA will follow the lead of these same agencies in the event of a state-level emergency. In the event of a local emergency, Non-Metro AAA will collaborate directly with the appropriate local or tribal government district or jurisdictions. Non-Metro AAA will refer to the Emergency and Contingency Plans of individual providers in more localized situations, to determine proper protocols and to identify the network of responders and resources that may be available.

For all emergencies, NMAAA works with a range of local partners appropriate for the emergency, including but not limited to emergency management offices, food pantries, emergency shelters, churches and faith-based organizations, and volunteer organizations such as the American Red Cross.

NMAAA will notify and coordinate with the appropriate emergency management entities when it identifies areas of unmet need. NMAAA will also work with local emergency management officials and local providers on agreements that will outline specific expectations of each organization. Taking the lead from the New Mexico Department of Homeland Security, the NMAAA will determine what course of action will be required.

Emergency Situations

Communities in New Mexico experience a broad range of emergency situations described below. NMAAA utilizes American Red Cross checklists to provide technical assistance to providers and to appropriately respond to specific emergency situations.

- **Pandemic:** Though pandemic situations may not occur frequently, it is important to address this emergency given the current COVID-19 pandemic situation affecting the world. During a pandemic there may be widespread closures, where only essential services are offered. Nutrition services are essential, and their continuation must be addressed in provider emergency and contingency plans.
- **Power Outage:** Planned or unexpected, power outages can last for a few hours, days or longer, and may disrupt communications, water, transportation, stores, and other services. This may impact needs such as lighting, heating, cooling, communication, food and medicine refrigeration, cooking, and medical equipment. The NMAAA collaborates with providers to conduct wellness calls in areas experiencing power outages to ensure the safety of consumers, as well as to develop tools to identify at-risk individuals who need additional support.
- **Weather-Related Storm Events:** Communities in New Mexico experience localized flooding, winter storms and heat waves every year. The NMAAA collaborates with providers to conduct outreach to communities that may be hard hit by weather-related events, to ensure that consumers have adequate access to food, water, a source of heating or cooling, and any medical devices or medication they may need.
- **Wildfire:** Many areas of the state have experienced wildfires, and the threat of wildfires is increasing with dry conditions caused by climate change. In the event of a wildfire, the NMAAA will collaborate

with providers to conduct wellness calls, assess the needs of the community, and coordinate evacuations, if necessary.

Business Continuity

NMAAA is committed to maintaining business continuity in the event of an emergency through the following means:

- **Office Locations:** NCNMEDD currently has office space in diverse geographic locations: Santa Fe, Tucumcari, and Las Cruces. This provides one physical location per PSA from which to coordinate emergencies, as well as options for onsite activities if one or more offices is damaged or threatened by an emergency.
- **Remote Locations:** All staff in the Santa Fe and Las Cruces offices have remote work capabilities, including laptops, cell phones, and VPN access to a central server where all NMAAA files are stored. In the event of an emergency that damages or threatens physical offices, staff can work from home or other remote locations, including emergency shelters. NCNMEDD will be upgrading computers and phones for the Tucumcari office in the next two years, which will provide Tucumcari staff with the same remote work capability.
- **Information Technology:** NCNMEDD contracts with Technology Solutions, with offices in Santa Fe, NM and Phoenix, AZ for information technology. All NMAAA data is stored in the cloud on NCNMEDD's server, OneDrive, Citrix, and WellSky. Technology Solutions backs up all data on the NCNMEDD server several times each day and manages VPN and Outlook access for staff. Technology Solutions performs an annual IT review for NCNMEDD. During the most recent review, NCNMEDD implemented multifactor identification and updated some functions to improve cybersecurity.
- **Phone Communication:** NCNMEDD has public toll free and main phone numbers through Vonage which can be forwarded to other phones or remote locations as needed.
- **Data Center:** NMAAA can utilize its Tucumcari Data Center to take, field or make calls in the event of an emergency.

Emergency Preparedness Plans – Involvement of the head of the State agency

OAA Section 307(a)(29):

The plan shall include information describing the involvement of the head of the State agency in the development, revision, and implementation of emergency preparedness plans, including the State Public Health Emergency Preparedness and Response Plan.

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RESPONSE:

The Cabinet Secretary for the New Mexico Aging and Long-Term Services Department coordinates with the New Mexico Department of Homeland Security and Emergency Management, New Mexico Department of Health, New Mexico Department of Health Care Authority, New Mexico Department of Veterans Services and the New Mexico Governor's Commission on Disability in addressing emergent situations for the New Mexico older adult and adults with disabilities population, participating in regular regional meetings and including the Area Agencies on Aging and direct service providers as the emergency applies.

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ATTACHMENT C
NEW MEXICO'S INTRASTATE FUNDING FORMULA FUNDS DISTRIBUTION PLAN

Introduction
The New Mexico Aging and Long-Term Services Department (ALTSD) allocates Title III and State General Revenue Funds appropriated for distribution to the Area Agencies on Aging on a formula basis in accordance with the Older Americans Act and its regulations. Section 1321.37(a) of the Older Americans Act regulations further requires the Department to "review and update its formula as often as a new State plan is submitted for approval." New Mexico's new State Plan has been developed for FFY 2026 through FFY 2029. After thoughtful discussion, careful consideration, AAA input and a thorough review of the current intrastate funding formula, a revised formula was presented to the ALTSD Secretary of the Department for approval. The recommended revision was accepted. During the first year of this state plan, FFY 2026, ALTSD will be working to add another "federally recognized" Planning and Service Area/Area Agency on Aging to its Aging Network. The new PSA will encompass the New Mexico Tribes, Pueblos and Nations. ALTSD anticipates that the federally recognized PSA 6/ Indian Area Agency on Aging will be operational by FFY 2027. Beginning in FFY 2027, the IFF will remain unchanged, the only modification in FFY 2027 will be that the federally recognized IAAA will receive Title III funds. Please note that the data presented in this IFF/Funds Distribution Plan are for FFY 2026. An amendment to the IFF will be submitted to AoA with updated data after the IAAA has become federally recognized.

Funding Formula Definitions

- **Federal Award** means allocation for Title III services.
- **Minority** means the race data defined by the U.S. Census Bureau**.**
- **Population** means the total senior population defined by the U.S. Census Bureau and population by weighted factors.
- **Poverty threshold** means the income cutoff, which determines an individual's poverty status as defined by the U.S. Census Bureau.
- **PSA** means a Planning and Service Area, which is designated by the New Mexico ALTSD as authorized in the New Mexico Department on Aging and Elder Services Older Americans Act In 1973.
- **Rural area** means a geographic location not within a Metropolitan or Urban area as defined by the State of New Mexico.
- **Weighted Factor** determined by factor percentage.

    - *A descriptive statement of the formula's assumptions and goals, and the application of the definitions of greatest economic need and greatest social need, including addressing the populations identified pursuant to 45 CFR § 1321.27(d)(1).*

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Formula Goals and Assumptions
The goals that will be addressed by the revised intrastate funding formula (IFF) follow:
Purpose: To develop a formula consistent with the purpose and requirements of the OAA and its regulations.

- To provide resources across the state for home and community-based services for older adults and adults with disabilities over the age of 60.
- To target resources in areas of the State with higher concentrations of older adults and adults with disabilities in greatest economic and social need, with special emphasis on low-income minority older adults residing in rural areas of the state.
- To create and implement a formula that distributes resources solely on the population characteristics of each planning and service area and reflects changes in characteristics among the PSAs by incorporating updated data.
- To develop a formula that is easily understood.

In developing the IFF, the Department determined the factors of the formula and the effects of the distribution of funds on the service delivery system across the State. Factors in the development of the formula were:

- The weights assigned to the formula factors should represent the emphasis and priority placed on the specific characteristics of adults over the age of 60.
- Funding formula factors must be derived from data, which is quantifiable by PSA, based on data from the U.S. Census Bureau.
- Older adults are currently receiving services based on existing historical patterns of service delivery. The effect on older adults presently receiving Title III services should be considered when developing and implementing a formula.
- The low revenue generating potential of rural areas and the high proportion of elderly in rural areas, including low-income elderly, necessitates a greater dependence on the Title III service system to meet the service needs of rural elderly. The revised funding formula reflects and considers these factors.
- Consideration of the NM Tribes and Pueblos applying for Title III funding during the AAAs RFP process.
- The revised funding formula reflects and considers these factors. It is the combination of federal, state, regional, and local targeting efforts that will implement this fundamental mandate of the Older Americans Act.

The revised IFF will provide AAAs with necessary resources and additional funding to support increased service cost and implement additional targeted strategies at the regional level by focusing on the greater concentration of older adults residing in rural areas of NM, minority older adults, and older adults in greatest economic and social need.

It is the combination of federal, state, regional, and local targeted efforts that will implement this fundamental mandate of the Older Americans Act. The Department will progressively apply the IFF to the state general funds over the years of the state plan.

- A list of the data used by PSA.

- New Mexico Population Data Summary by PSA

New Mexico's Intrastate Funding Formula

PSA	Population	60+ (includes PSA 6)	60+ Rural	60+ Below Poverty (65+)	60+ Minorities	Number of Counties
1	672,508	163,620	1,032	15,103	72,446	1
2	757,080	201,665	32,878	18,562	102,008	13
3	302,780	65,882	61,060	6,219	26,207	11
4	380,976	95,374	43,199	9,825	44,971	8
5	*	*	*	*	*	*
6*	79,827	18,084	18,084	*	18,084	*
Total	**2,193,171**	**544,625**	**134,636**	**67,793**	**263,716**	33

Source: US Census 2022 Estimates
*PSA 5 and 6 older adult population totals are captured in the county totals. PSA 5 is Navajo Nation (receives Title III through the Tri-State agreement), PSA 6 IAAA (only State funds).
* PSA 6 Population data is demonstrated by Tribal Land below.
For the first year of this State Plan on Aging period, FFY 2026, PSA 6 is combined within PSAs 1-4.

New Mexico Population Data Percentage by PSA

PSA →	1	2	3	4	5	6	Total
Population	29.81%	35.32%	16.10%	18.77%	0.00%	0.00%	100.00%
60+ (60%)	24.46%	36.08%	18.86%	20.59%	0.00%	0.00%	100.00%
60+ Rural (17%)	0.75%	23.80%	44.19%	31.27%	0.00%	0.00%	100.00%
60+ Below Poverty (13%)	30.38%	37.34%	12.51%	19.77%	0.00%	0.00%	100.00%
60+ Minorities (10%)	29.49%	41.53%	10.67%	18.31%	0.00%	0.00%	100.00%
Number of Counties	3.03%	39.39%	33.33%	24.24%	0.00%	0.00%	100.00%

Source: US Census 2022 Estimates

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PSA	**New Mexico Counties and Tribal Lands**
PSA 1 (County)	Bernalillo
PSA 2 (Counties)	San Juan, McKinley, Cibola, Rio Arriba, Los Alamos, Sandoval, Valencia, Santa Fe, Taos, Torrance, Colfax, Mora, San Miguel
PSA 3 (Counties)	Union, Harding, Quay, Guadalupe, DeBaca, Curry, Lincoln, Chaves, Roosevelt, Eddy, Lea
PSA 4 (Counties)	Catron, Grant, Hidalgo, Socorro, Sierra, Luna, Doña Ana, Otero
PSA 5 (Tribal Land)	New Mexico portion of the Navajo Nation
PSA 6 (Tribal Lands)	Mescalero Apache Nation, Jicarilla Apache Nation; Acoma, Cochiti, Isleta, Jemez, Laguna, Nambe, Ohkay Owingeh, San Felipe, San Ildefonso, Sandia, Santa Ana, Santa Clara, Santo Domingo, Picuris, Pojoaque, Taos, Tesuque, Zia, Zuni Pueblos

Population	**Acronym (Population %)**	**Weighted Amounts**
60+	A	60%
60+<POVERTY	B	10%
60+ RURAL	C	17%
60+MINORITY	D	13%

XA + XB + XC + XD = Total Amount of Allocation

Description	**Acronym for Formula**
Federal Award	FF
Weighted Amounts	W
Funding per factor Population	F
Population	A, B, C, D
Allocation Per Population	X

Award Calculation	FF*W=F

PSA 6	**Tribes/Pueblos/Nations**	**Total Population**	**Total 60+**
	Acoma Pueblo	3,223	685
	Cochiti Pueblo	1465	460
	Isleta Pueblo	4075	1,032
	Jemez Peublo	2042	417
	Jicarilla Apache Nation	3106	397
	Laguna Pueblo	4514	910

	Mescalero Reservation	4005	739
	Nambe Pueblo	2026	634
	Ohkay Owingeh	6861	1,341
	Picuris Pueblo	2340	635
	Pojoaque Pueblo	3595	897
	Sandia Pueblo	5306	1,400
	San Felipe Pueblo	3590	754
	San Ildefonso Pueblo	2261	538
	Santa Ana Pueblo	1131	215
	Santa Clara Pueblo	11893	3,020
	Santa Domingo Pueblo	2792	327
	Taos Pueblo	5128	2,017
	Tesuque Pueblo	1156	261
	Zia Pueblo	873	64
	Zuni Reservation	8445	1,341
PSA 6	**Total**	**79,827**	**18,084**

*PSA 6 will be included in the state fiscal year 2027 distribution and U.S. Census estimates.

Funding per factor population	
60+	F* A= X(A)
60+<POVERTY	F* B=X(B)
60+ RURAL	F*C=X(C)
60+MINORITY	F*D= X(D)

Take funding per factor population and add all together to get the total allocation:	
Total Amount of Allocation	X(A)+X(B)+X(C)+X(D)= Total Allocation
This Intrastate funding formula will be applied to each Title III service allocation.	

- *A descriptive statement of each factor (i.e. 60+ living alone – number of people who are 60 and older that live alone) and weight/percentage used for each factor (i.e. 60+ living alone = 5%).*

Funding Formula Factors and Weights
In order for a particular factor to be included in the intrastate funding formula, it must be:

- Derived from data which is quantifiable by PSA;
- Based on data which is derived from the U.S. Census Bureau; and

Contain the following factors:

- The state's population 60 years of age and older in the PSAs as an indicator of need in general (60+ population).
- The number of the state's population 60 years of age and older at or below the poverty threshold in the PSAs as an indicator of greatest economic need (60+ Poverty).
    - As an indicator of greatest social need, the number of the state's elderly in the PSAs who are most in need and likely food insecure.
- The number of the state's population 60 years of age and older residing in rural areas of the PSAs.
- The number of the state's population 60 years of age and older and who are minority.

The funding formula factors, and their weights are as follows:

Population 60+ (POP)	60%
Population 60+ in Rural Jurisdictions (RUR)	17%
Population 60+ Minority (MIN)	10%
Population 60+ Below Poverty (POV)	13%

Allocations of funds by PSA based on the IFF segmented by Part of Title III (e.g., chart of PSA X, IIIB supportive Services, $900,000).

Application of the Intrastate Funding Formula

The intrastate funding formula is:

A=**60%** (Population-60+) B=**13** % (Population POV-60+) C=**17%** (Population RUR-60+)
D=**10%** (Population MIN-60+)

FF*W=F F*A=X(A), F*B=X(B), F*C=X(C), F*D=X(D)
X(A)+X(B)+X(C)+X(D)= Total Allocation

The data used in the Intrastate Funding Formula reflects the most current and up-to-date information from the U.S. Census Bureau, including mid-census estimates when available.

Note: PSA 6 will not receive administrative funds until FFY 2027 after the designation process is approved.

New Mexico's Funding Formula Including the Projected Distribution of Funds

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IFF Weights	IFF Factors	Metro Area Agency on Aging	Non-Metro AAA	Non-Metro AAA	Non-Metro AAA	PSA 5 Navajo Nation - Funds distributed through the Tri-State Agreement, funds not accounted for in the IFF	Indian Area Agency on Aging *Note: the IAAA will NOT be receiving funds until FFY 2027	
	PSA	1	2	3	4	5	6	Total
60.0%	60+	$1,352,987.79	$1,995,560.84	$1,043,115.03	$1,138,689.94	$-	$-	$5,530,353.60
17.0%	60+ Rural	$11,703.60	$372,859.62	$692,463.29	$489,907.01	$-	$-	$1,566,933.52
13.0%	60+ Below Poverty	$364,060.20	$447,439.94	$149,909.98	$236,833.17	$-	$-	$1,198,243.28
10.0%	60+ Minorities	$271,851.11	$382,781.50	$98,340.86	$168,752.12	$-	$-	$921,725.60
	Total (SFY25)	$2,000,602.70	$3,198,641.89	$1,983,829.16	$2,034,182.25	$-	$-	$9,217,256.00
	% of Funding	21.705%	34.703%	21.5230%	22.0693%	0.00%	0.0%	100.0%

New Mexico's Other Funding Formula Provisions

For any state general funds received that have no prescribed formula stated in the appropriation, the Department has the authority to determine the methodology to be used to distribute those funds.
Whenever the SUA determines that any amount allotted to an AAA for a fiscal year under this formula will not be used by an AAA for carrying out the purposes for which the allotment was made, the Department may make such allotment available for one or more PSA(s) to the extent allowable under this funding formula. Funds will be reallocated to those AAAs, which request and demonstrate the need for additional funds in accordance with procedures developed by the Department. Any reallocated amount made available to an AAA shall remain available only until the end of that fiscal year.
The allotment to the AAA may be reduced the following fiscal year by the amount of any disallowance if the AAA has expended funds allocated under this part:

- For purposes which an audit report determines to be questionable costs which are deemed disallowed by the Department.
- For purposes which an audit report determines to be unallowable.
- For purposes that are otherwise determined to be unallowable according to cost principles contained in applicable OMB Circulars or the approved grant/contract award.

This reduction will occur in the Fiscal Year following the identification of the disallowance.
An Area Agency on Aging is required to expend the OAA, and Department approved minimum percentage of their direct Title III-B provide service allocation on access services (20%), in-home services (8%), and legal services 6%) in the Fiscal Year determined by the financial closeout report. If no waiver of the requirement has been granted by the Department for that Fiscal Year, the Area Agency on Aging must, for the next fiscal year following the submission of their report, expend the minimum percentage in the reported year. If the Area Agency on Aging does not expend the required expenditure amount, it may be withheld from the Area Agency on Aging during the Fiscal Year following the Fiscal Year in which the shortage is determined.

- *States must provide the source of the data used to run in the IFF. States must use the "best available data." In most cases, the best available data is the most current US Census. A*

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State also may use more recent US Census estimates from the American Community Survey; other more recent data of equivalent quality available in the State also may be considered.

A base administration amount of 10% is distributed to each PSA for Title III B, C-1, C-2, and E. Remaining distribution amount for Title III B, C-1, C-2, D, and E is calculated using the IFF at 25.33% for PSA1, 34.80% for PSA2, 16.84% for PSA 3, 19.86% for PSA4, and 3.16% for PSA6.

A numerical/mathematical statement of the formula is required for Parts B, C-1, C-2, D and E. Definitions of the terms used in the numerical/mathematical statement are required.

	B - Supportive Services	C1 - Congregate Meals	C2 - Home Delivered Meals	D - Preventive Health	E - National Family Caregiver Support	Total
GRANT #	2201NMOASS-03	2201NMOACM-03	2201NMOAHD-03	2201NM OAPH-03	2201NMOAF C-03	
CFDA #	93.044	93.045	93.045	93.043	93.052	
Total "New" Funds Available (Using FFY23)	$ 2,613,433.00	$ 3,425,435.00	$ 2,333,476.00	$ 169,011.00	$ 1,295,901.00	$ 9,837,256.00
						$ -
One-time funding prior year rollover	$ -	$ 285,238.64	$ 108,511.45	$ 64,885.31	$ 341,364.60	$ 800,000.00
						$ -
Less State Unit on Aging - Administration	$ -	$ (367,500.00)	$ (247,500.00)		$ (135,000.00)	$ (750,000.00)
Less State Unit on Aging - Ombudsman	$ (670,000.00)					$ (670,000.00)
Funds Available for AAAs	**$ 1,943,433.00**	**$ 3,343,173.64**	**$ 2,194,487.45**	**$ 233,896.31**	**$ 1,502,265.60**	$ 9,217,256.00
10% Base (Distributed Equally Between PSAs, ie Divided by 4)	$ 194,343.30	$ 334,317.36	$ 219,448.74	$ 23,389.63	$ 150,226.56	$ 921,725.59
Remaining balance after 10% base	$ 1,749,089.70	$ 3,008,856.28	$ 1,975,038.71	$ 210,506.68	$ 1,352,039.04	$ 8,295,530.41
PSA 1						
10% Base (1/4)	$ 48,585.83	$ 83,579.34	$ 54,862.18	$ 5,847.40	$ 37,556.64	$ 230,431.39
24.86%	$ 434,823.68	$ 748,001.67	$ 490,994.62	$ 52,331.98	$ 336,116.91	$ 2,062,268.86
Total	$ 483,409.51	$ 831,581.01	$ 545,856.80	$ 58,179.38	$ 373,673.55	$ 2,292,700.25
10% Admin	$ 48,340.95	$ 83,158.10	$ 54,585.68	$ -	$ 37,367.36	$ 223,452.09
Program	$ 435,068.56	$ 748,422.91	$ 491,271.12	$ 58,179.38	$ 336,306.20	$ 2,069,248.16
Total	$ 483,409.51	$ 831,581.01	$ 545,856.80	$ 58,179.38	$ 373,673.55	$ 2,292,700.25
PSA 2						
10% Base (1/4)	$ 48,585.83	$ 83,579.34	$ 54,862.19	$ 5,847.40	$ 37,556.64	$ 230,431.40
36.32%	$ 635,269.38	$ 1,092,816.60	$ 717,334.06	$ 76,456.03	$ 491,060.58	$ 3,012,936.64
Total	$ 683,855.21	$ 1,176,395.94	$ 772,196.25	$ 82,303.43	$ 528,617.22	$ 3,243,368.04
10% Admin	$ 68,385.51	$ 117,639.59	$ 77,219.62	$ -	$ 52,861.72	$ 316,106.45
Program	$ 615,469.70	$ 1,058,756.35	$ 694,976.62	$ 82,303.43	$ 475,755.50	$ 2,927,261.59
Total	$ 683,855.21	$ 1,176,395.94	$ 772,196.25	$ 82,303.43	$ 528,617.22	$ 3,243,368.04
PSA 3						
10% Base (1/4)	$ 48,585.83	$ 83,579.34	$ 54,862.19	$ 5,847.40	$ 37,556.64	$ 230,431.40
18.01%	$ 315,011.05	$ 541,895.02	$ 355,704.47	$ 37,912.25	$ 243,502.23	$ 1,494,025.03
Total	$ 363,596.88	$ 625,474.36	$ 410,566.66	$ 43,759.65	$ 281,058.87	$ 1,724,456.43
10% Admin	$ 36,359.69	$ 62,547.44	$ 41,056.67	$ -	$ 28,105.89	$ 168,069.68
Program	$ 327,237.20	$ 562,926.92	$ 369,510.00	$ 43,759.65	$ 252,952.98	$ 1,556,386.75
Total	$ 363,596.88	$ 625,474.36	$ 410,566.66	$ 43,759.65	$ 281,058.87	$ 1,724,456.43
PSA 4						
10% Base (1/4)	$ 48,585.83	$ 83,579.34	$ 54,862.19	$ 5,847.40	$ 37,556.64	$ 230,431.40
20.81%	$ 363,985.57	$ 626,142.99	$ 411,005.56	$ 43,806.44	$ 281,359.32	$ 1,726,299.88
Total	$ 412,571.40	$ 709,722.33	$ 465,867.75	$ 49,653.84	$ 318,915.96	$ 1,956,731.28
10% Admin	$ 41,257.14	$ 70,972.23	$ 46,586.77	$ -	$ 31,891.60	$ 190,707.74
Program	$ 371,314.26	$ 638,750.10	$ 419,280.97	$ 49,653.84	$ 287,024.37	$ 1,766,023.53
Total	$ 412,571.40	$ 709,722.33	$ 465,867.75	$ 49,653.84	$ 318,915.96	$ 1,956,731.28
Federal Funds Available for AAAs	$ 1,943,433.00	$ 3,343,173.64	$ 2,194,487.45	$ 233,896.30	$ 1,502,265.60	$ 9,217,256.00

- *A separate descriptive and numerical/mathematical statement may be provided for Title III Part D – Evidence Based Disease Prevention and Health Promotion Services, to target the medically underserved and which there are a large number of older individuals who have the greatest economic need for such services, per Section 362 of the OAA. If a separate formula is used for Part D, a separate descriptive and numerical/mathematical statement is required.*

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- Response: There is not a separate formula for Title III D. Prior to distribution under the IFF to the AAAs, funds are deducted from Title III funds for State Plan Administration and the State Long-Term Care Ombudsman Program allocations.
- Funding Source and Allocation Methodologies OAA Title III D is 100 percent federally funded. The intrastate distribution of funds made available by OAA Title III D is based on the following formula:
  - 50 percent weight - Share of population age 60 and older with income below poverty in the PSA.
  - 50 percent weight - Share of people age 65 and older living in "Medically Underserved Areas," plus the number of people age 65 and older who live in areas defined as having "Medically Underserved Populations" in the PSA.

- *A statement explaining how Nutrition Services Incentive Program (NSIP) funds are distributed.*

NSIP: Fund Distribution based on prior year deliverables.

PSA 1	PSA 2	PSA 3	PSA 4	Total
$252,195.22	$993,018.66	$412,294.14	$594,234.98	$2,251,743.00

*PSA 6 will be included in the state fiscal year 2027 distribution.

New Mexico Aging & Long-Term Services Department

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ATTACHMENT D
IDENTIFICATION OF PSA GEOGRAPHIC BOUNDARIES OF AAAS

PLANNING & SERVICE AREAS

The New Mexico Aging Network is comprised of the Aging & Long-Term Services Department, Area Agencies on Aging (AAAs), and providers within each of the planning and service areas (PSAs). The NM Aging Network has two "federally recognized" AAAs that serve four of the designated Planning and Services Areas (PSAs) in the State.

PSA 1 serves Bernalillo County.

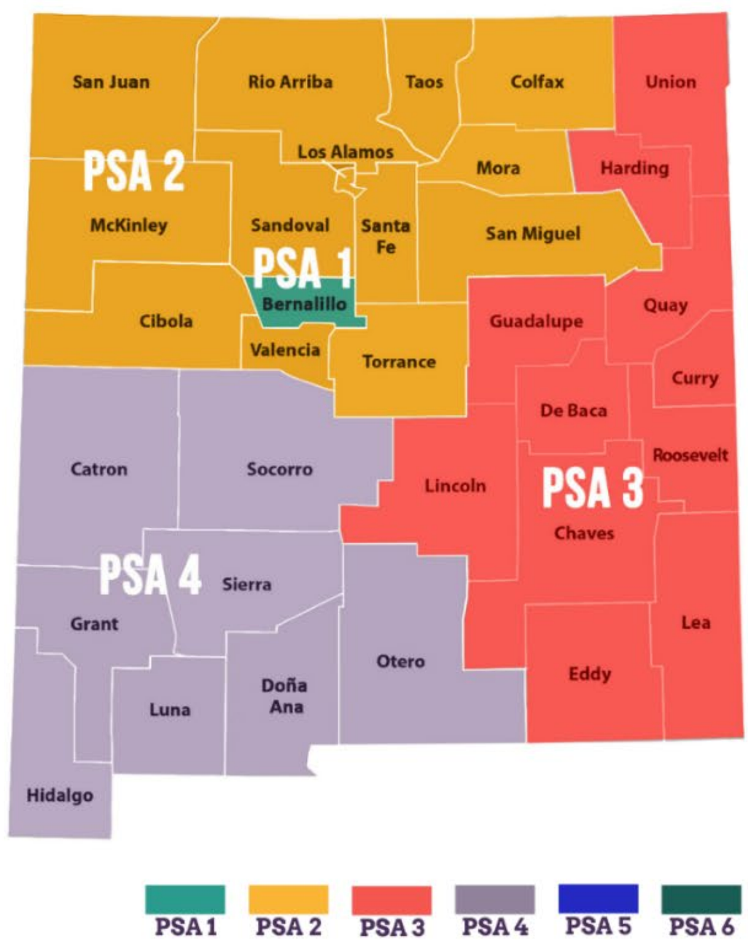
PSA 2 serves Cibola, Colfax, Los Alamos, McKinley, Mora, Rio Arriba, Sandoval, San Miguel, San Juan, Santa Fe, Taos, Torrance, and Valencia counties.

PSA 3 serves Chaves, Curry, De Baca, Eddy, Guadalupe, Harding, Lea, Lincoln, Quay, Roosevelt, and Union counties.

PSA 4 serves Catron, Doña Ana, Grant, Hidalgo, Luna, Otero, Sierra, and Socorro counties.

PSA 5 serves the NM portion of the Navajo Nation (*not pictured*).

PSA 6 serves New Mexico's 19 Pueblos, Jicarilla Apache Nation, and Mescalero Apache Tribe *(not pictured)*.



PUEBLOS AND RESERVATIONS IN NEW MEXICO

PSAs	Pueblo, Nation, or Tribe
PSA 5	New Mexico portion of the Navajo Nation
PSA 6	Mescalero Apache Nation, Jicarilla Apache Nation; Acoma, Cochiti, Isleta, Jemez, Laguna, Nambe, Ohkay Owingeh, San Felipe, San Ildefonso, Sandia, Santa Ana, Santa Clara, Santo Domingo, Picuris, Pojoaque, Taos, Tesuque, Zia, Zuni Pueblos

Note: A new map will be developed and sent to AoA as a State Plan on Aging Amendment once the IAAA becomes a federally recognized AAA.

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ATTACHMENT E
EVIDENCE OF PROVIDING THE MINIMUM PUBLIC COMMENT PERIOD

The public comment period on ALTSD's website was from April 15 – May 15, 2025; public comment period was extended to May 23rd for all stakeholders and again extended to June 13th, and then June 25th for Tribes, Pueblos and Nations.

- Website- Draft State Plan posted to ALTSD public website- https://aging.nm.gov/uploads/documents/State_Plan_on_Aging_2025-2029_Onesheet-6.pdf
- Methods to provide input include webform, email, and US Mail
- Email — ALTSD-NMStatePlanComments@altsd.nm.gov; U.S. Mail — ALTSD Aging Network Division Public Comment, 2550 Cerrillos Road, Santa Fe, NM 87505
- Email notifications, e-newsletter publication, and digital social posts from ALTSD on behalf of the Office of Indian Elder Affairs (OIEA) to New Mexico Tribes, Pueblos, and Nation's providers
- Presentations to All Pueblo Council of Governors meeting: April 25, 2024 and May 22, 2025. OAA Title II and VI services, collaboration, and ways to provide input on the State Plan process discussed.
- Tribal Consultation Sessions on May 7th, May 14th, May 16th, May 19th, and June 25th. Seventeen of NM Tribes, Pueblos and Nations were represented.

ALTSD has sought Tribal input and is committed to continuing to obtain meaningful feedback for the FY2026-2029 State Plan. The efforts by ALTSD to obtain comments from Tribes, Pueblos, and Nations are outlined below:

1. On March 21, 2024, ALTSD OIEA sent email to all Tribal Providers that ALTSD OIEA was gathering stakeholder feedback for the FY2026-2029 Draft State Plan and to expect an email from the University of New Mexico requesting participation in a provider survey and encouraged to participate in the survey.
2. In developing the FY2026-2029 State Plan, ALTSD worked with the University of New Mexico to administer an initial needs assessment and it was sent to all Tribal Providers on March 25, 2024.
3. On March 26, 2024, ALTSD OIEA sent email to all Tribal Providers as a reminder to complete the State Plan Survey which was sent on March 25, 2024.
4. A second phase of information gathering was used to further identify needs and inform of the drafting of the state plan by deploying The Service Provider Survey and was sent to all Tribal providers, including adult day centers, and all state providers. Statewide, ALTSD received a 39.6% response rate, with a 16.7% response

rate from Tribes, Pueblos and Nations. Information from this survey was used to construct the 2025-2029 Draft State Plan.

5. ALTSD posted the FY2026-2029 Draft State Plan on the ALTSD website on April 15, 2025, with an email announcement sent the same day about the Draft State Plan being open and available for comment. Sent via MailChimp to all state and Tribal Providers.
6. On May 13, 2025, OIEA held a monthly meeting and announced the 2025-2029 Draft State Plan on Aging. The 2025-2029 ALTSD Draft State Plan on Aging was the first item on the agenda, and OIEA requested that feedback be submitted on the website no later than May 23, 2025. This information, including the website to provide feedback, was included in the power point used during this OIEA meeting.
7. Once the FY2026-2029 Draft State Plan was posted on the ALTSD website, OIEA sent voluminous electronic information and reminders about commenting on the Draft Plan, to include the following:
    a. Email sent April 24, 2025 of open comment period until May 15 was sent to Tribal Providers, Leadership & Administrators
    b. Certified mail letter was sent April 24, 2025 of open comment period until May 15 was sent to Tribal Providers, Leadership & Administrators
    c. Email sent May 1, 2025, titled "Share Your Feedback on ALTSD's 2025-2029 State Plan on Aging" via MailChimp. Sent to all Tribal Providers as well as Tribal elder subscribers.
    d. Email sent May 7, 2025 of open comment period until May 15, 2025, for the State Plan was sent to Tribal Providers .
    e. Email sent May 13, 2025 to Tribal Providers May 2025 Newsletter. Sent via MailChimp to all Tribes, Pueblos, and Nations. The Newsletter contained information on comment period for Draft State Plan.
    f. Email sent May 15, 2025. Reminder that open comment period for State Plan closing on May 23, 2025. Sent to Tribes, Pueblos, and Nations via MailChimp
    g. Email sent May 15, 2025, notice of open comment period for State Plan being extended. Sent to Tribal Providers.
    h. Emails sent May 16, 2025, May 21, 2025, May 22, 2025, . Reminder that open comment period for State Plan closing May 23, 2025. Sent to Tribes, Pueblos, and Nations via MailChimp
    i. Emails sent June 2,4,6,9,10,11,13,16,18,20,23 Reminder of open comment perior sent to Tribal Providers and Leadership
8. May 12, 2025 ALTSD OIEA made telephone calls to all Tribal provider managers and directors and spoke with the Tribal entities to again remind and encourage them to submit feedback on the Draft State Plan. If a manager or director was unavailable, a message was left.

Michelle Lujan Grisham, Governor
Emily Kaltenbach, Cabinet Secretary
Antoinette Vigil, Deputy Cabinet Secretary
Angelina Flores-Montoya, Deputy Cabinet Secretary

ATTACHMENT F
NEW MEXICO STATEWIDE NEEDS ASSESSMENT

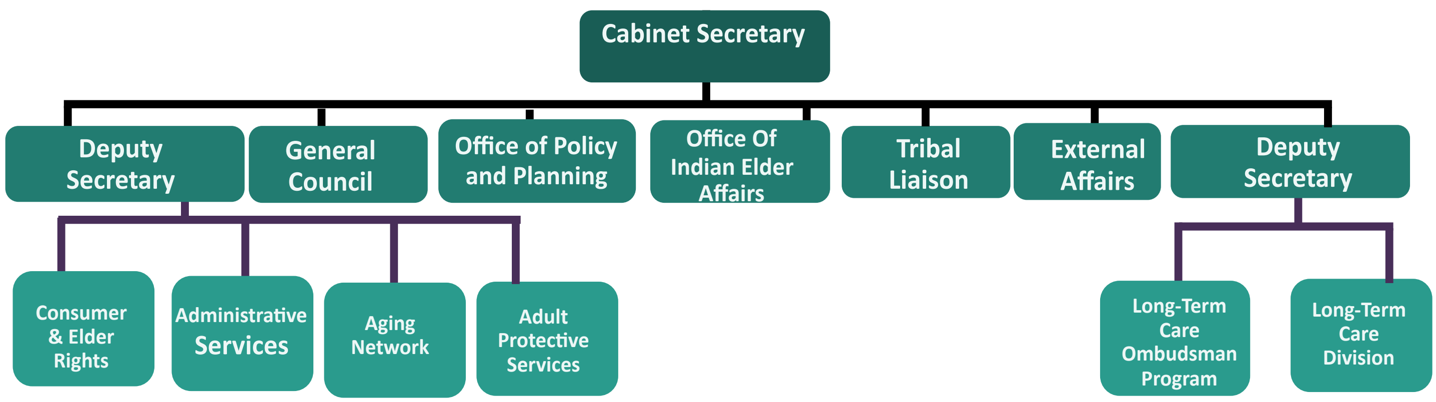
The University of New Mexico's Center for Applied Research & Analysis team conducted a New Mexico Older Adults Needs Assessment –Phase 1 to inform the State Plan and completed the report in June 2023. This assessment is 62 pages in length, therefore ALTSD is adding the website link for review and can be accessed here:

https://isr.unm.edu/reports/2023/new-mexico-older-adult-needs-assessment-phase-1.pdf

Michelle Lujan Grisham, Governor
Emily Kaltenbach, Cabinet Secretary
Antoinette Vigil, Deputy Cabinet Secretary
Angelina Flores-Montoya, Deputy Cabinet Secretary

ATTACHMENT G
AGING AND LONG-TERM SERVICES DEPARTMENT ORGANIZATION CHART

AGENCY ORGANIZATION



Michelle Lujan Grisham, Governor
Emily Kaltenbach, Cabinet Secretary
Antoinette Vigil, Deputy Cabinet Secretary
Angelina Flores-Montoya, Deputy Cabinet Secretary

ATTACHMENT H
STATE PLAN COMMENTS-TABLE

Summary of State Plan Public Comment, Tribal Consultations, and Response

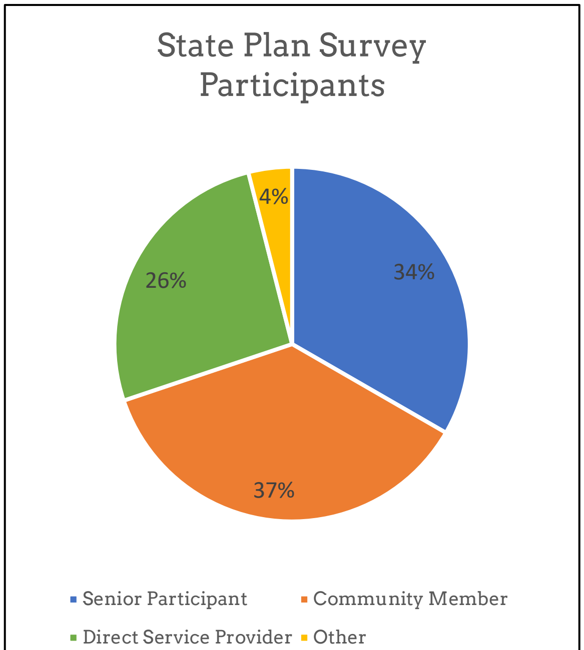
The New Mexico State Plan Public comment period was open from April 15 – May 15, 2025; public comment period extended to May 23rd for all stakeholders and again extended to June 25th for Tribes, Pueblos and Nations. Details on the Public Comment Period are in Attachment E.

A total of 125 survey responses were received as part of the public comments with 116 offering detailed comments. A total of 30 detailed email comments were received, including eight letters from Tribes, Pueblos, and Nations (summary of comments in Table below). The most significant change to highlight is the draft State Plan outlined three goals, and the new plan includes four goals. Therefore, Goal 4 priority ranking is missing in the survey results.

Survey Results Summary:

- 9% of survey responses member of TPN and 15% of survey response direct service provider of a TPN
- Participants from 25 counties across NM.
- 71% of responses from the following counties: Bernalillo, Santa Fe, Sandoval, Taos, and Chaves.
- 87% understand plan well to extremely well
- 69% felt the proposed plan met their needs well to extremely well
- 44% believe the plan will be successful,28% did not, 27% neutral.
- When ranking highest Goal priorities:
    - **Goal 1** received the highest priority (55%)
    - **Goal 2** was next (36%)
    - **Goal 3** followed (10%)

Note: TPN= Tribes, Pueblos, Nations



The table below is a summary of the comments received via the survey, via email, or via letter. Each comment was reviewed by an external reviewer and ALTSD staff. The comments were synthesized into key themes for further review and placed into three categories:

1) **AP =** Addressed in Plan. Indicates it was included in the draft plan and the current plan and the
   section title where it can be found in the plan.
2) **PR** = Plan Revised. Indicates the draft plan was revised, where possible, based on the received
   comment and the section where it can be found in the revised plan.
3) **NA=** not applicable to state plan but noted for ALTSD to address

Key Themes from Public Feedback:	
Public Input and Tribal Consultation Review: Themes	**Actions:** **AP= addressed in plan and section** **PR= plan revised based on comment** **NA= not applicable to state plan but noted for ALTSD to address**
Access and Equity a) **Rural Disparities:** Major service gaps in rural areas (e.g., providers, transport, in-home supports). b) **Inclusion:** Urged outreach to LGBTQ+ elders, tribal communities, people living with HIV, and low-income populations. **c) Funding Equity:** Concerns about the Intrastate Funding Formula not reflecting non-economic needs as required under the Older Americans Act. d) Add **Adult Day Care** services e) **Inclusion:** a) Include TPNs in "wheel" b) Include Elders as Resources	a) <u>AP</u>- Focus Groups, NM Aging Network, Allocating Resources to Meets Needs of Priority Populations, Core Programs, Title V and Employment Programs, Coordinate Title III and Title VI, IFF, Goals 1.4, 1.6, 2.4, 3.5 b) <u>PR</u>- Allocating Resources of Priority Population, Goal 2.4, specifically the LTGBQ and people living with HIV. <u>AP</u> – Focus Groups, NM Aging Network; Coordinating Title III and VI, IFF, Priority Populations, Goal 1, 2 c) <u>AP</u> - The IFF includes greatest social need as defined by NMAC in Attachment C, under IFF Formula table definition provided "the SUA's definitions of greatest … and social need"; Goal 2; no requirement that SUA definition need match. d) <u>PR</u>- Added in NM Aging Network, Goals 1.2, 1.5, 1.6, 4.3, e) <u>PR</u>- added to "wheel", included in Mission, identified in community partners, and Goal 4; Coordinate Title III program with Title VI Native American Programs,
Home and Community-Based Services a) Strong support for aging in place. b) Requests for help with **home modifications**, **repairs**, **in-home meals**, and **housekeeping**.	a) <u>AP</u> – ALTSD's Mission, Core Programs, Expanding Access to HCBS, Goal 1 (1.5; 1.6; 1.7). b) <u>AP</u> – Focus Groups, Core Programs, NM Aging Network, Title V and Employment Programs, Goals: 1.4, 1.6, 3.1, 3.3,

Caregiving Support a) **Family caregivers** need respite, mental health support, and training. b) **Paid caregivers** face low wages, shortages, and limited training opportunities. c) **Re-establish a Long-Term Care Division** to track workforce issues.	a) AP – Core Programs, Goal 1, Goal 2 PR – Added objective to include the implementation of Title III E caregiving services, Goals 1.7 AP – Needs Assessment, Core Programs, Allocating Resources, Goals: 1.2, 1.5, 1.6. a. *Note, OAA Title III E funded programs are for unpaid, informal caregivers/family caregivers. b) AP – Expanding Access to HCBS, Goal 1.5, 1.7
Healthcare Access a) Acute **provider shortages**, especially in rural areas. b) **Transportation barriers** to care. c) Call for increased access to **mental health**, **dementia**, and **Alzheimer's care**.	a) AP – Partnerships and Collaboration*; Expanding Access to HCBS, Goal 1.5, 1.6 b) AP – Goal 1.3, 16, 2.1,2.4. c) AP – NM Priority Populations; Expanding Access to HCBS, Allocating Resources Priority Populations, Goal 1.2, 1.4, 1.5, 2.4, 3.1. *ALTSD partners with healthcare communities and is the lead advocate for Older Adults in the state. (45CFR 1321.11)
Housing Stability a) Need for **affordable housing**, tenant protections, and senior housing vouchers. b) Expand **assisted living**, memory care, and transitional housing.	a) AP – Partnerships and Collaboration, Goal 1.6, 2, 2.5. * b) AP – Partnerships and Collaboration. * *ALTSD is a partner with other State Departments and is the lead advocate for Older Adults in the state. (45CFR 1321.11)
Social Connection a) Support for rural **senior centers** b) Desire for more **fitness, wellness, and social programs** to reduce isolation.	a) AP – Core Programs, Title V and Employment Programs, Coordinating Title III and Title VI, Goals 1.4, 2, 2.4, 2.5. b) AP – NM Priority Populations, Coordinating Title III and VI, Goals 1.4, 3.1, 3.3, 4.3.
Communication & Accessibility a) Need for **plain language**, **direct outreach**, and **culturally relevant messaging**. b) Address the **digital divide** for seniors with limited tech access or literacy. c) Improve **TPN consultation** and input from TPN stakeholders d) Provide **Title III information** & training	a) AP - Focus Groups, Coordinating Title III and Title VI, Collaborating to Reduce Elder Abuse, Neglect and Exploitation, Goals 2.1, 3.2, 4.2, 4.4. b) PR – added Goals 2.1, 2.5, 3.3. c) PR- Goal 4 PR- Coordinate Title III program with Title VI Native American Programs, Goal 4 d) PR- Goal 4

Program Oversight & Accountability a) Calls for clear **goals, timelines**, and **metrics**. b) Suggested mechanisms include **advisory boards** and **community oversight**.	a) AP- State Plan Goals, Objectives, Strategies and Outcomes. b) PR – Statement added in Executive Summary that ALTSD has a policy advisory committee (not federally required) AP – Stewardship and Oversite Responsibilities and Responses.
Funding and Feasibility a) Concerns about **stable, long-term funding**. b) Questions about **how goals will be implemented and staffed**.	a) AP – Suggestion in the executive summary, the Secretary can speak to the uncertainty of federal funding at this time. b) AP- State Plan outlines goals implemented through ALTSD staff, through contracts with providers of services and through collaboration and partnerships.
Policy & Structural Recommendations a) Update "**greatest social need**" to include LGTQ older adults and HIV status. b) **Regulatory flexibility** for tribal programs and support for **non-profit long-term care homes**. c) Assess strengths and gaps of existing system. Present findings to Tribal Stakeholders for review. d) Provide technical assistance to support complex federal oversight under Title III. e) Collaborate with NM Title VI Coalition and NM Indian Council on Aging f) Include timeline of feedback collection, methods, audiences, including tribal specific consultations in the plan g) Analyze and revise allocation formula to apply rural, underserved community factors for equitable distribution of resources across communities, including small Tribes.	a) AP - IFF includes greatest social need as defined by NMAC in Attachment C. ACL/AoA guidance, NM Priority Populations states "the SUA's definitions of greatest … and social need"; no requirement that the SUA's definition of greatest social need match 1321. b) NA – Outside of ALTSD's purview to grant regulatory flexibility that is not supported by federal law, rule or regulation c) AP- - Phase 2: Stakeholder Engagement and Data Collection, Attachment E, Attachment F PR- Goal 4.1 d) PR- Goal 4.3, e) PR- Goal 4.1, 4.3, 4.4, f) AP- Phase 2: Stakeholder Engagement and Data Collection, Attachment E, PR- Attachment F g) PR- Goal 4 AP- NM's Aging Network, Attachment C

Note: TPN= Tribes, Pueblos, Nations

ATTACHMENT I

AREA PLAN AMENDMENT DEVELOPMENT GUIDELINES_FY25

PURPOSE

The purpose of this document is to provide guidance and instruction regarding the needed FY25 Area Agency on Aging (AAA) area plan amendment and update that will be used for FY26 contract planning. The area plan amendment shall align with the State Unit FFY26 state plan submission and the required ACL rule changes. The AAA must address what, how, and where services will be developed or expanded in each of the respective PSAs.

Implementation of the Older Americans Act new Rule, 45 CFR 1321Implementation of the Older Americans Act new Rule, 45 CFR 1321

On February 6, 2024, the Administration for Community Living (ACL) released the final rule to update regulations for the implementation of the OAA programs. This rule prescribes requirements State agencies shall meet to receive grants to develop comprehensive and coordinated systems for the delivery of the following services: supportive, nutrition, evidence-based disease prevention and health promotion, caregiver, legal, and, where appropriate, other services. The new rule took effect on March 15, 2024. Services provided via State agencies, Area Agencies on Aging (AAA), and local service providers under the OAA Act must comply with the requirements in 45 CFR 1321 by October 1, 2025.

The submission of this Area Plan update shall follow the area plan amendment requirements specified in 45 CFR 1321 which includes:

- The AAA shall identify populations within the planning and service area at greatest economic need and greatest social need.
- Service Gaps/Assessment and evaluation of unmet need, each area agency shall submit objectively collected, and where possible, statistically valid, data with evaluative conclusions concerning the unmet need for supportive services, nutrition services, evidence-based disease prevention and health promotion services, family caregiver support services, and multipurpose senior centers. The evaluations for each area agency shall consider all services in these categories regardless of the source of funding for the services.

https://www.ecfr.gov/current/title-45/subtitle-B/chapter-XIII/subchapter-C/part-1321

AREA PLAN AMENDMENT/UPDATE DEVELOPMENT GUIDELINES

The amendment narrative should include any significant information regarding changes to the services of program(s), and if appropriate, including budgetary impact. Other items to address would include changes in the organizational structure of the AAA, changes in contract providers, and significant changes in community needs, including changes in waiting lists for services. The AAA must also show evidence of public hearings or Advisory Council meetings held in relation to the changes described.

Service Gaps/Service Delivery Modifications

AAAs must identify gaps in services across each PSA which focus on services that are not currently being administered or where there is not a provider of such service within the local area. Previously identified service gaps in the following service areas across New Mexico:

- Case Management
- Chore/Homemaker
- Caregiver Respite
- Legal Services
- Transportation/Assisted Transportation
- Supplemental Nutrition
  A. **Malnutrition** remains a concern for many of the Older Adults in New Mexico. Please list how the AAA will be supporting the providers of nutrition services through training, funding and other methods in utilizing the Nutrition Health Screening Tool to increase the number of meals to consumers who are at high nutritional risk.
  B. **Grab and Go:** If the area agency requests to allow Title III, part C–1 funds to be used as set forth in § 1321.87(a)(1)(i) through (iii), it must provide the following information to the State agency:

1. Evidence, using participation projections based on existing data, that provision of such meals will enhance and not diminish the congregate meals program, and a commitment to monitor impact on congregate meals program participation.
   2. Description of how provision of such meals will be targeted to reach those populations identified as in greatest economic need and greatest social need.
   3. Description of the eligibility criteria for service provision.
   4. Evidence of consultation with nutrition and other direct services providers, other interested parties, and the general public regarding the need for and provision of such meals; and
   5. Description of how provision of such meals will be coordinated with nutrition and other direct services providers and other interested parties.

C. Area plans shall incorporate services which address the incidence of hunger, food insecurity and malnutrition; social isolation; and physical and mental health conditions.

- Senior Center Activities

The Area Plan update shall also document and create an implementation plan on how the AAA will come into compliance with the following new and updated regulations:
Links to OAA Regulations 1988 to 2024 Comparison Chart (Developed by ACL)

- Subpart C – Area Agency Responsibilities
- 1321.55 Mission of the area agency.
- 1321.57 Organization and staffing of the area agency.
- 1321.59 Area agency policies and procedures.
- 1321.61 Advocacy responsibilities of the area agency.
- 1321.63 Area agency advisory council.
- 1321.67 Conflicts of interest policies and procedures for area agencies on aging.
- 1321.69 Area agency on aging Title III and Title VI coordination responsibilities.

Please note that ALTSD is currently working on revising its state plan, policies and procedures to align with the new rule.

GENERAL INSTRUCTIONS

- Provide all requested documents to:
  Andrea Segura, Bureau Chief Senior Services Bureau
  NM Aging & Long-Term Services Department
  andrea.segura@altsd.nm.gov
- If Board or Advisory Council meetings to review and/or approve the submission are scheduled after the submission date, omit the pages that contain such approval and submit a draft. The signature pages and any edits required by the board/council may be forwarded to the ALTSD by the second business day following the last of these meetings.

Services provided via State agencies, AAA, and local service providers under the OAA Act must comply with the requirements in 45 CFR 1321 by October 1, 2025.

DUE DATE The FY25 AAA area plan amendment submittals are due to the department **no later than close of business December 6, 2024.**

If you have any questions, please contact Andrea Segura at (505) 819-1030.