



New Mexico Aging & Long-Term Services Department

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

# **New Mexico Aging and Long-Term Services Department Area Plan on Aging Development Guide New Mexico Area Agencies on Aging**

*Partners in Lifelong Independence and Healthy Aging*

**Area Plan Period: July 1, 2026 through June 30, 2030**



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## FY27 Area Plan Budget Report

All Area Agencies on Aging (AAAs) must submit an Area Plan AAA Administration 1A-1B/ Summary by Service 2A-2B budget form per PSA, each year for approval prior to receiving funding from the Department under an Area Plan on Aging. The Area Plan AAA Administration 1A-1B/ Summary by Service 2A-2B budget form must be submitted to: Denise.King@state.nm.us.

In FY27, all AAAs must also submit an updated Area Plan AAA Administration 1A-1B/ Summary by Service 2A-2B budget form per PSA by the 10<sup>th</sup> working day following the end of the first quarter of the fiscal year. The Area Plan Budget Report submitted with the initial area plan is based on projected allotment funding well in advance of actuals. An updated budget that incorporates the most current funding levels available will provide the Department with more accurate information regarding service budgeting.

## Preparing the Area Plan Budget Report

Use the following information when preparing your budget report. The current FY27 Planning, and Service Area (PSA) Allotments appear at the end of this document and any revised allotments will be provided if they become available.

## Allocation of Funds

The allocation of state funds is based on current funding levels. The state is required to provide a match for federal funds based on the funding formulas. As state funding in New Mexico exceeds the federal match requirement, the additional funds are considered to be "excess state dollars". Maintenance of effort should take priority when budgeting excess state dollars. Excess state dollars can be used by area agencies to provide services that supplement Older Americans Act services. Excess state dollars may also be used to serve population groups and provide services not covered through the Older Americans Act. Area agencies have the flexibility to evaluate programs needs and direct this funding as appropriate. Area plans should provide detailed descriptions of such alternative programming.

Area Plan budget allocates a sufficient proportion of federal funds (from Title III Part B) to each service area for the provision of specific categories of services, primarily Access, In-Home Services, and Legal Assistance, with the exact minimum proportion determined by the State agency. The purpose is to ensure these essential services are available across all planning areas.

(A) access services: including 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.



## 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	*
<b>Total</b>	<b>2,193,171</b>	<b>544,625</b>	<b>134,636</b>	<b>67,793</b>	<b>263,716</b>	<b>33</b>

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
<b>Population</b>	29.81%	35.32%	16.10%	18.77%	0.00%	0.00%	100.00%
<b>60+ (60%)</b>	24.46%	36.08%	18.86%	20.59%	0.00%	0.00%	100.00%
<b>60+ Rural (17%)</b>	0.75%	23.80%	44.19%	31.27%	0.00%	0.00%	100.00%
<b>60+ Below Poverty (13%)</b>	30.38%	37.34%	12.51%	19.77%	0.00%	0.00%	100.00%
<b>60+ Minorities (10%)</b>	29.49%	41.53%	10.67%	18.31%	0.00%	0.00%	100.00%
<b>Number of Counties</b>	3.03%	39.39%	33.33%	24.24%	0.00%	0.00%	100.00%

Source: US Census 2022 Estimates

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



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<b>PSA 4 (Counties)</b>	Catron, Grant, Hidalgo, Socorro, Sierra, Luna, Doña Ana, Otero
<b>PSA 5 (Tribal Land)</b>	New Mexico portion of the Navajo Nation
<b>PSA 6 (Tribal Lands)</b>	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%

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

<b>Award Calculation Formula</b>	$FF*W=F$
<b>Total Amount of Allocation Formula</b>	$XA+XB+XC+XD= \text{Allocation}$

PSA 6	Tribes/Pueblos/Nations	Total Population	Total 60+
	Acoma Pueblo	3,223	685
	Cochiti Pueblo	1465	460
	Isleta Pueblo	4075	1,032
	Jemez Pueblo	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



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	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	<b>Total</b>	<b>79,827</b>	<b>18,084</b>

Source: US Census 2022 Estimates  
 \*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:	
<b>Total Amount of Allocation</b>	$X(A) + X(B) + X(C) + X(D) = \text{Total Allocation}$
This Intrastate funding formula will be applied to each Title III service 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**

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	Total
	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
	<b>Total (SFY25)</b>	<b>\$2,000,602.70</b>	<b>\$3,198,641.89</b>	<b>\$1,983,829.16</b>	<b>\$2,034,182.25</b>	<b>\$-</b>	<b>\$-</b>	<b>\$9,217,256.00</b>
	<b>% of Funding</b>	<b>21.705%</b>	<b>34.703%</b>	<b>21.5230%</b>	<b>22.0693%</b>	<b>0.00%</b>	<b>0.0%</b>	<b>100.0%</b>



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**Refer to NM Aging Services State Plan for additional information.**

## Target Population

Target populations include persons age 60 or older and their spouses of any age, younger disabled persons who reside with persons age 60 or older, caregivers of any age who care for persons age 60 or older, caregivers age 60 or older who care for children or younger disabled persons, and the recipients of their care.

Per the Older Americans Act, an effort must be given to serving eligible persons with the greatest social or economic need, with particular attention to minority individuals with low incomes. Efforts must also be given to targeting individuals residing in rural areas, individuals with limited English proficiency, and individuals with Alzheimer's disease and related disorders, with severe disabilities or at-risk of institutionalization and their caregivers.

Target populations may include people aged 50 through 59 for services provided with only state funding. Target populations for each service may vary according to the service provided.

## Differentiation of Funds

State funds must be differentiated from federal, local, and program income funds in all budgets and financial reports submitted to the NM Aging & Long-Term Services Department.

Enter Resources by funding source and service within each of five (5) program clusters Supportive Services (Title III B), Congregate Nutrition (Title III C1), Home Delivered Nutrition (Title III C2), Preventive Health (Title III D), and Caregiver Support (Title III E). The service and data element definitions that must be used are located beginning on page 6 of this document.

Keep in mind that an interdependent relationship exists between service units and the utilization of funding resources. That is, if you enter units for a particular service, you must enter a funding amount for that service in the budget report. Likewise, if you enter a funding amount for a service in the budget report, you must enter units.

## Minimum Proportion of Funds

OAA Section 307(a)(2):

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

**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: 30%

In-Home Services: 18%

Legal Assistance: 8%

## Units of Service Definitions Aligned with OAAPS



Attachment D  
Service Unit Definitions

### Allotments (Projected)

#### Title III PSA 1

Total Title III PSA 1 Federal Funds (projected): (Calculated at 21.705% does not include PSA 6 population)  
General Fund (projected):

#### Title III PSA 2

Total Title III PSA 2 Federal Funds (projected): (Calculated at 34.703 does not include PSA 6 population)  
General Fund (projected):

#### Title III PSA 3

Total Title III PSA 3 Federal Funds (projected): (Calculated at 21.523 does not include PSA 6 population)  
General Fund (projected):

#### Title III PSA 4

Total Title III PSA 4 Federal Funds (projected): (Calculated at 22.0693 to include PSA 6 population)  
General Fund (projected):

## Fiscal Policy AAA Responsibilities

- Implement and enforce consistent fiscal policies aligned with state guidance, including:
  - Acceptance and use of voluntary contributions (§1321.9(c)(2)(x))
  - Clear eligibility criteria and protocols for cost sharing (§1321.9(c)(2)(xi))
  - Documentation of program income and its reinvestment (§1321.9(c)(2)(xii))

- Oversight of private pay practices and expenditures (§1321.9(c)(2)(xiii–xv))
  - Conduct fiscal monitoring of all service providers (§1321.9(a)(1)).
- Provider Responsibilities:
- Comply with AAA-issued fiscal policies.
  - Track and report contributions and program income (§1321.9(c)(2)(x–xii)).

### **AAA Responsibilities:**

- Require AAA Contracted Entities to document use of NSIP funds and maintain procurement records showing domestic sourcing.
- AAA Contracted Entities Responsibilities:
- Use NSIP funds only for allowable food purchases.
- Track and report eligible meals and expenditures.
- A reliable reporting system (ALTSD approved database system) must be in place to assure accurate recording of Nutrition Services Incentive Program (NSIP) eligible meals.