

FY2027 Allocations Preparation Checklist

This checklist is designed to help you prepare for the [Philadelphia EMA's Regional Allocation Process](#). If you follow all of these steps you will be prepared to participate in your region's allocations meeting. You can adapt this checklist to your needs. Not everyone will need to follow every step. People who have little or no experience with the Allocations process are encouraged to go through all the steps for the most meaningful participation.

Step 1. Register for your region's allocations meetings:

You need to register for both mandatory (Parts 1 & 2) meetings for your region to attend. All regions are required to attend Part 1 on Monday, July 20th in order to partake in Part 2.

<i>Register for the New Jersey Counties Allocations</i>
REGISTER FOR PART 1: Monday, July 20th from 12:00 - 4:00 p.m.
REGISTER FOR PART 2: Wednesday, July 22nd from 12:00 - 4:00 p.m.
<i>Register for the Pennsylvania Counties Allocations</i>
REGISTER FOR PART 1: Monday, July 20th from 12:00 - 4:00 p.m.
REGISTER FOR PART 2: Thursday, July 23rd from 12:00 - 4:00 p.m.
<i>Register for the Philadelphia County Allocations</i>
REGISTER FOR PART 1: Monday, July 20th from 12:00 - 4:00 p.m.
REGISTER FOR PART 2: Friday, July 24th from 12:00 - 4:00 p.m.

Any questions from Part 1? [Register for the virtual Q&A on Tuesday, July 21st!](#) Drop in the Zoom room from any time 12:00 p.m. - 4:00 p.m.

Step 2. Learn the basics:

- [Introduction to Allocations](#) (PDF updated in 2026)
- [Introduction to Allocations](#) (video prepared in 2020)

Step 3. Review the allocations materials:

- [2026 Allocations Service Booklet](#)
 - *This booklet contains everything you need for every service category (currently funded or not): service definitions, Clients Served, Units Provided, Expenditures and Allocation, and Over/Under-spending over time. There is also relevant data and information on funding by all Ryan White Parts/other payers for each service!*
- [2025 Funded Services Review](#)
 - *This PowerPoint has information on service definitions, utilization, need, and more! This link will lead you to our Allocations materials page for both Core and Support Services under Ryan White Part A.*
- [Regional RW Part A 2026 Funding Pie Charts](#) (PDF)
- [Other Regional Funding FY2025/26](#)

Step 4. Quiz yourself:

- Take the [Allocations Preparation Self-Assessment](#)

Step 5. Dig into the data:

- Read through the [2026 EMA Epidemiological Update](#) presented to the HIPC from DHH
 - This also contains EHE and MMP data
- See this table with [CSU, MMP, and Consumer Survey Data](#) (PDF)
- Check out the [2022 Consumer Survey Service Findings](#)– This document highlights the survey responses to service category needs & accessibility
- Look at the [FY2025-2026 Final Expenditure Report](#) to check out over and underspending trends regionally - *please note that final invoices are not included in report; updates appear within other materials*
- Understand where HIPC's priorities lie by checking out the [2026 Priority Setting results](#) – *this list ranks the least to most prioritized services as determined by the CPC and HIPC*

Step 6. Prepare your own materials:

- Fill out the [Allocations Worksheet](#) (PDF) to prepare for your regional meeting.

Step 7. Understand your role:

- Read about [Conflict of Interest](#) (PDF) and how it may relate to you. Conflict of Interest is a characteristic of the nature of the Planning Body. A conflict of interest is an actual or perceived interest by a Planning Body member in an action which results in personal, professional, or organizational gain.