FUNDING FORMULA OVERVIEW:
ALLOCATING MEASURE B FUNDS
FOR NON-MANDATED SERVICES

November 2011

ALAMEDA
County Transportation Commission

Background

▶ Initial formula developed in 2003, reflecting recommendations made by PAPCO and the Joint Funding Formula Subcommittee

  ◻ Uses age and disability data from US Census 2000 and annual SSI data from the Social Security Admin.

  ◻ Result of evaluation of a wide variety of potential formula factors

Background

► Minor changes made to funding formula in 2007 and 2008
 □ Weighting and SSI data
► Current formula expires in 2012
 □ In 2008, both Committees decided to evaluate available data sources in 2011 (Census 2010, American Community Survey)

Givens of the Formula

► The following is included in the Expenditure Plan and cannot be changed:

Of the total revenue collected from Measure B:

 □ 10.45% go to specialized transportation for seniors and people with disabilities
  ■ 5.63% goes to *mandated* paratransit services
  ■ **3.39% goes to *non-mandated* paratransit services**
  ■ 1.43% goes to Gap Program

Givens of the Formula

▶ Percent of funds for **non-mandated paratransit services** allocated to each Planning Area:

- □ North County = 1.24%
- □ Central County = .88%
- □ South County = 1.06%
- □ East County = .21%

= 3.39%

Expenditure Plan

▶ *"Funds are also provided for non-mandated services, aimed at improving mobility for seniors and people with disabilities. These funds are provided to the cities in the County and to Alameda County based on a formula developed by PAPCO."*

Givens of the Formula

► Funds from each planning area **may not be transferred** into another area

► PAPCO formula allocates funding **ONLY within** each planning area

PAPCO Formula: How is funding allocated? (A hypothetical example)

► Planning Area – Disneyland

- Adventureland
- Fantasyland
- Frontierland
- Tomorrowland

City	Zip Codes
Adventureland	11111
Fantasyland	22222, 33333
Frontierland	44444
Tomorrowland	55555, 66666

How is funding allocated? – Step 1

► One factor: Seniors 65+

▫ Collect census data per zip code

Zip Code	# of Seniors 65+
11111	20
22222	30
33333	20
44444	40
55555	10
66666	30
Total	**150**

How is funding allocated? – Step 2

► Apply data per zip code to "Cities"

▫ Determine each Cities' percentage of the Planning Area total

City	Zip Codes	65+ per City	% City of PA
Adventureland	11111	20	13.3%
Fantasyland	22222, 33333	50	33.3%
Frontierland	44444	40	26.6%
Tomorrowland	55555, 66666	40	26.6%
Total		**150**	**100%**

How is funding allocated? – Step 3

► What is the projected annual allocation?

  ❑ $10,000 for the Disneyland Planning Area, distribute via percentage to each City

City	65+ per City	% City of PA	City Allocation
Adventureland	20	13.3%	$1,330
Fantasyland	50	33.3%	$3,330
Frontierland	40	26.6%	$2,660
Tomorrowland	40	26.6%	$2,660
Total	**150**	**100%**	**$10,000**

Current Funding Formula Factors

► Individuals 5-15 with any type of disability

► Individuals 16+ with go-outside-home disability *

► Individuals 65-79

► Individuals 80+

  ❑ Multiplied by 1.5, given that many individuals over 80 have disabilities, and therefore have greater need for paratransit services

► SSI recipients 18 and older

  ❑ Held constant since 2006

* Individual has a physical, mental, or emotional condition lasting 6 months or more that makes it difficult to go outside the home alone (e.g. to shop or visit a doctor's office)

Questions for Discussion

► **Funding Formula Factors:** Do age, income and disability continue to be the issues that should be addressed in the formula? Are there additional factors that should be taken into consideration?

► **Data Sources: Is there sufficient data available to measure each of these factors?**
  - Do you feel we can rely on ACS data for disability, or should age be used as a surrogate?
  - Since SSI data is no longer available, should income be included as a measure separate from disability?
  - Are there any other data sources we're not aware of? Brainstorm…

Questions for Discussion

► **Allocation to the Planning Area: Should a portion of funds be allocated for optional use at the planning area level?**
  - Is there support for this concept?
  - If so, should money be taken "off the top" to fund planning-area level programs and the balance distributed to city programs?
  - Should this be optional or mandatory?