

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

November 2011



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%	} = 3.39%
▣ Central County = .88%	
▣ South County = 1.06%	
▣ East County = .21%	

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?
- ▶ **Data Sources: Is there sufficient data available to measure each of these factors?**
 - ▣ Since there is not an accurate and reliable data source for disability, can age be used as a surrogate?
 - ▣ Since SSI data is no longer available, should income be included as a measure separate from disability?

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?

TABLE FOR DATA DISCUSSION



Disability Data (Average ACS 1-Year Estimates, 2005-1010)

	Population with Disability	% Planning Area Total
Alameda	7,194	11%
Albany	-	-
Berkeley	10,293	15%
Emeryville	-	-
<i>Oakland</i>	<i>49,868</i>	<i>74%</i>
<i>Piedmont</i>	<i>-</i>	<i>-</i>
Oakland TOTAL	49,868	74%
NORTH COUNTY	67,355	100%
<i>Hayward</i>	<i>14,599</i>	<i>63%</i>
<i>Ashland</i>	<i>-</i>	<i>-</i>
<i>Cherryland</i>	<i>-</i>	<i>-</i>
<i>Castro Valley</i>	<i>-</i>	<i>-</i>
<i>Fairview</i>	<i>-</i>	<i>-</i>
<i>San Lorenzo</i>	<i>-</i>	<i>-</i>
Hayward TOTAL	14,599	63%
San Leandro	8,753	37%
CENTRAL COUNTY	23,352	100%

	Population with Disability	% Planning Area Total
Fremont	16,974	74%
Newark	-	-
Union City	6,062	26%
SOUTH COUNTY	23,036	100%
<i>Sunol</i>	<i>-</i>	<i>-</i>
<i>Pleasanton</i>	<i>5,147</i>	<i>42%</i>
Pleasanton TOTAL	5,147	42%
<i>Dublin</i>	<i>-</i>	<i>-</i>
<i>Livermore</i>	<i>7,181</i>	<i>58%</i>
LAVTA TOTAL	7,181	58%
EAST COUNTY	12,329	100%