

STATE OF ALASKA
THE LEGISLATURE

LEGISLATIVE AFFAIRS AGENCY

POLICY STATEMENTS
JUNE 20, 1984
10/10/84

MEMORANDUM

February 20, 1984

SUBJECT: Funding for retroactive provisions
of CSSB 347 (Judiciary)

TO: Senator Bill Ray *JAA*

FROM: Linn H. Asper *LB*
Legislative Counsel

You have asked if CSS. 347 (Judiciary), as currently drafted, requires that the money needed to make payment of retroactive longevity bonuses under the proposed residency requirements must come from the 12.5 percent of permanent fund income that is to be credited to the longevity bonus account.

The starting point for this inquiry is that there is nothing in the current version of SB 347 that indicates where the retroactive money is to come from. This means that a general fund appropriation could be made to finance the retroactive payments. Looking at the provisions of the bill that deal with the longevity bonus account and the longevity bonus fund, it becomes apparent that money in those funds is not intended to be used for retroactive payments. AS 37.13.147(c), proposed in section 1 of the bill, states that "The legislature may annually appropriate an amount sufficient to pay monthly longevity bonuses for the subsequent fiscal year" (Emphasis added) This language indicates that the new source for financing longevity bonus payments is to be used for future payments rather than retroactive payments. Of course, the language of the proposed subsection does not prevent the legislature from making an appropriation from the longevity bonus account for retroactive payments if it wishes to do so, but such an appropriation is not mandated by the language of the bill. As I understand the proposed mechanism for paying longevity bonuses, the size of a monthly bonus would be decreased if the retroactive appropriation were to be made from the longevity bonus account. This is clearly not the intent of the bill.

LHA:ojb
J3/114

Row 4
7.00 4.75

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: April 12, 1984

Page 1 of 3

REQUEST

Bill/Resolution No.: HCS CSSB 347 (SA)
Title: Permanent fund/Longevity Bonus

FISCAL DETAIL

Agency Affected: Administration
Program Category Affected: Social Services

Sponsor: Ray
Requestor: _____
Date of Request: _____

BRU, Program or Subprogram(s) Affected:
Longevity Bonus Program

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES	11.8	49.9	28.7	28.7	28.7	28.7
200 TRAVEL						
300 CONTRACTUAL	10.2	60.9	60.9	60.9	60.9	60.9
400 SUPPLIES	.5	1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 GRANTS, CLAIMS	2,225.0	13,350.0	13,350.0	13,350.0	13,350.0	13,350.0
800 MISCELLANEOUS						
TOTAL OPERATING	2,247.5	13,462.3	13,440.6	13,440.6	13,440.6	13,440.6
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND	2,247.5	13,462.3	13,440.6	13,440.6	13,440.6	13,440.6
FEDERAL FUNDS						
OTHER						
TOTAL	2,247.5	13,462.3	13,440.6	13,440.6	13,440.6	13,440.6

POSITIONS:

FULL-TIME (FTE)	.2	1.0	1.0	1.0	1.0	1.0
PART-TIME (FTE)	.3	1.0	0	0	0	0
TEMPORARY	0	0	0	0	0	0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL:

Not indicated by sponsor.

ANALYSIS: Attach a separate page for analysis

Prepared By: E. Louis Ketter, Director
Division: Pioneers' Benefits

Phone: (907) 465-4400

Date: April 12, 1984

Approved by Commissioner: Lisa Rudd
Agency: DEPARTMENT OF ADMINISTRATION

Date: 4/12/84

Distribution (by Agency preparing fiscal note):

- Legislative Finance
- Legislative Sponsor
- Requestor
- Office of Management and Budget
- Impacted Agency(ies)

Rev. 3-20-84
19/FORMS/FN

HCS CSSB 347 (SA)
Fiscal Note Analysis
Prepared By Division of Pioneers' Benefits
Department of Administration
April 12, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

ASSUMPTIONS

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications. This number is only an estimate, however, and the actual number could vary.

There will be approximately 10,050 persons on the Longevity Bonus program by May 1, 1984. Therefore, it is assumed that an additional 4,450 persons may be enrolled on the program under the bill.

- c. The amount of the bonus would be \$250 per month.
- d. No retroactive payments would be paid.
- e. There may be a much larger rate of growth in this program with new legislation. We do not know what the rate of growth will be, but we assume that there will be an increased cost for grants over the next six years. The FY 87 budget preparation will reflect the first full year of experience on which to base more specific figures.
- f. All expenses would be paid from the State General Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on May 1, 1984.

HCS CSSB 347 (SA)
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 April 12, 1984

Additional funds needed for FY 84 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 11,836
Clerk V, PFT (2 months)	\$4,785
Clerk II, PPT (2 positions, 2 months)	7,051
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	10,156
Commodities	500
Office supplies	
Grants	
Additional funds needed for Bonus payments to additional persons who will be eligible (4,450 x 2 x \$250)	2,225,000
	\$ 2,247,492
Total additional funds required for FY 84	

Additional funds needed for FY 85 are computed as follows:

Personal Services	\$ 49,862
Clerk V, PFT	\$28,710
Clerk II, PPT (2 positions, 6 months)	21,152
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	60,937
Commodities	1,500
Office supplies and file cabinets for application and recipient files	
Grants	
Additional funds needed for Bonus payments to additional persons who will be eligible (4,450 x 12 x \$250)	13,350,000
	\$13,462,299
Total additional funds required for FY 85	

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARC. UNIT G	FORM 12 PAGE/LINE	GOV.	APPRDV.	DISAPP.
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN-NUMBER	BRU PRIORITY 2	LOCATION Juneau	ELECTION DISTRICT 4	LEG.		
3.	CONTINUATION LEVEL				ADDITION					
4.	TYPE OF EXPENDITURE				AMOUNT					
	1		2		3					
	PERSONAL SERVICES									
5.	Salary	1,510/mo.			12,080					
6.	Benefits				2,022					
7.	Supplemental Benefits									
8.	Fixed Benefits									
9.	TOTAL PERSONAL SERVICES		01		14,102					
10.	Travel		02							
11.	Contractual		03							
12.	Commodities		04							
13.	Equipment		05							
14.	Other									
15.	TOTAL COST				14,102					
JUSTIFICATION										
<p>The program expects to receive applications from 4,450 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Two permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>										
	RECEIPT CODE	FUNDING SOURCE								
16.		Federal Receipts		1002						
17.		G.F. Match		1003						
18.	100	General Funds		1004		14,102				
19.		I-A Receipts		1005						
20.		Program Receipts		102B						
21.		Other								
FOR B&M USE ONLY										
4A KEY NUMBER _____										

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk V				RANGE/STEP 11B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP.		
2.	TYPE OF POSITION PFT	STAFF MONTHS 12	RP NUMBER	PCN. NUMBER	BRU PRIORITY 1	LOCATION Juneau	ELECTION DISTRICT 4	LEG.				
3.	CONTINUATION LEVEL				JUSTIFICATION							
4.	TYPE OF EXPENDITURE				<p>The program expects to receive applications from 4,450 persons who will meet the new eligibility requirements when the bill is effective. A Clerk V position is required to supervise two PPT Clerk II positions, who will be required to process the volume of applications. In addition, the Clerk V will be responsible for calculation of any retroactive benefits which may be due.</p> <p>At the end of eight months, it is expected that the receipt of applications will level off and the Clerk V position will then be required to assist with actions necessary for continuing eligibility of increased number of recipients, and added volume of data input.</p>							
	1		2								3	
	PERSONAL SERVICES											
5.	Salary	1,914/mo.	22,968									
6.	Benefits		1,454									
7.	Supplemental Benefits		1,408									
8.	Fixed Benefits		2,880									
9.	TOTAL PERSONAL SERVICES		01	28,710								
10.	Travel		02									
11.	Contractual		03									
12.	Commodities		04									
13.	Equipment		05									
14.	Other											
15.	TOTAL COST			28,710								
	RECEIPT CODE	FUNDING SOURCE										
16.		Federal Receipts 1002										
17.		G.F. Match 1003										
18.	100	General Funds 1004		28,710								
19.		I-A Receipts 1005										
20.		Program Receipts 1028										
21.		Other										
FOR B&M USE ONLY												
4A KEY NUMBER _____												

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT 3	FORM 12 PAGE/LINE	GOV.	APPRDV.	DISAPP.		
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN. NUMBER	BRU PRIORITY 3	LOCATION Bureau	ELECTION DISTRICT 4	LEG.				
3.	CONTINUATION LEVEL				JUSTIFICATION							
4.	TYPE OF EXPENDITURE				<p>The program expects to receive applications from 4,450 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Two permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>							
	1		2								3	
	PERSONAL SERVICES											
5.	Salary	1,510/mo.		12,080								
6.	Benefits			2,022								
7.	Supplemental Benefits											
8.	Fixed Benefits											
9.	TOTAL PERSONAL SERVICES		01	14,102								
10.	Travel		02									
11.	Contractual		03									
12.	Commodities		04									
13.	Equipment		05									
14.	Other											
15.	TOTAL COST			14,102								
	RECEIPT CODE	FUNDING SOURCE										
16.		Federal Receipts	1002									
17.		G.F. Match	1003									
18.	100	General Funds	1004	14,102								
19.		I-A Receipts	1005									
20.		Program Receipts	1028									
21.		Other										
FOR B&M USE ONLY												
4A KEY NUMBER _____												

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: April 4, 1984

REQUEST

Bill/Resolution No.: CSSB 347 (Fin)

Title: Permanent Fund/Longevity Bonus

Sponsor: Ray

Requestor: Mulcahy

Date of Request: _____

FISCAL DETAIL

Agency Affected: Administration

Program Category Affected: Social Services

BRU, Program or Subprogram(s) Affected:
Longevity Bonus Program

TABLE OF CONTENTS

Fiscal Note	Page 1 of 6
Fiscal Note Analysis	Page 2 of 6
Analysis of Additional Costs	Page 3 of 6
Permanent Funds Available	Page 4 of 6
Costs of Program (By Year)	Page 5 of 6
Grants (Bonus) Budget Projections	Page 6 of 6

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: April 4, 1984

Page 1 of 6

REQUEST

Bill/Resolution No.: CSSB 347(Fin)
Title: Permanent Fund/Longevity Bonus

Sponsor: Ray
Requestor: Mulcahy
Date of Request: February 24, 1984

FISCAL DETAIL

Agency Affected: Administration
Program Category Affected: Social Services

BRU, Program or Subprogram(s) Affected:
Longevity Bonus Program

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES	11.8	49.9	28.7	28.7	28.7	28.7
200 TRAVEL						
300 CONTRACTUAL	9.5	56.9	57.9	58.9	59.9	60.9
400 SUPPLIES	.5	1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 GRANTS, CLAIMS	2,076.0	12,456.0	12,096.0	11,736.0	11,376.0	11,016.0
800 MISCELLANEOUS						
TOTAL OPERATING	2,097.8	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND	2,097.8	(26,335.7)	(33,116.4)	(35,275.4)	(37,434.4)	(39,593.4)
FEDERAL FUNDS						
OTHER		38,900.0	45,300.0	47,100.0	48,900.0	50,700.0
TOTAL	2,097.8	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6

POSITIONS:

FULL-TIME (FTE)	.2	1.0	1.0	1.0	1.0	1.0
PART-TIME (FTE)	.3	1.0	0	0	0	0
TEMPORARY	0	0	0	0	0	0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL: In FY 85 there would be an expenditure of \$38,900.0 in Permanent Fund Distributable Income and a reduction in the Longevity Bonus General Funds Budget of \$26,335.7. In succeeding years Permanent Funds would increase and General Funds would decrease.

ANALYSIS: Attach a separate page for analysis

Prepared By: E. Louis Keller, Director
Division: Pioneers' Benefits

Phone: (907) 465-4400
Date: April 4, 1984

Approved by Commissioner: Lisa Rudd
Agency: DEPARTMENT OF ADMINISTRATION

Date: 4/5/84

Distribution (by Agency preparing fiscal note):
Legislative Finance
Legislative Sponsor
Requestor
Office of Management and Budget
Impacted Agency(ies)

Rev. 3-20-84
19/FORMS/FN

CSSB 347 (Fin)
Fiscal Note Analysis
Prepared By Division of Pioneers' Benefits
Department of Administration
April 4, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

This fiscal note was requested to be prepared using the following assumptions:

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications.

There will be approximately 10,348 persons on the Longevity Bonus program by July 1, 1984. Therefore, it is assumed, as requested using the February 22 information, that an additional 4,152 persons will be enrolled on the program in FY 85 under the bill.

- c. The amount of the bonus would be \$250 per month. According to calculations of Permanent Fund Distributable Income issued by the Department of Revenue in January of 1984, only \$38.9 million would be available for credit to the Longevity Bonus account in FY 85. This amount would fund only 12,967 persons, rather than 14,500. Therefore, the additional \$4.6 million needed to fund 14,500 persons would have to be obtained from another source.
- d. No retroactive payments would be paid.
- e. There may be a much larger rate of growth in this program with new legislation. We do not know what the rate of growth will be, but we assume that there will be an increased cost for grants over the next six years. The FY 87 budget preparation will reflect the first full year of experience on which to base more specific figures.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) would be paid from the General Fund. Bonus payments would be paid from the Longevity Bonus Account established from earnings of the Permanent Fund, except for all expenses in FY 84 and the additional \$4.6 million in grants needed in FY 85, which would be paid from the General Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on May 1, 1984.

CSSB 347 (Fin)
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 April 4, 1984

Additional funds needed for FY 84 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 11,836
Clerk V, PFT (2 months)	\$4,785
Clerk II, PPT (2 positions, 2 months)	7,051
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	9,492
Commodities	500
Office supplies	
Grants	
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 2 x \$250)	2,076,000
Total additional funds required for FY 84	\$ 2,097,828

Additional funds needed for FY 85 are computed as follows:

Personal Services	\$ 49,862
Clerk V, PFT	\$28,710
Clerk II, PPT (2 positions, 6 months)	21,152
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	56,950
Commodities	1,500
Office supplies and file cabinets for application and recipient files	
Grants	
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 12 x \$250)	12,456,000
Total additional funds required for FY 85	\$12,564,312

November 9, 1983

Permanent Funds Available for
Longevity Bonus Grants
CSSB 347 (Fin)

FY 85	-	\$37,400,000	+	\$1,500,000 (interest)	=	\$38,900,000
FY 86	-	\$48,900,000	+	\$1,960,000 (interest)	=	\$50,860,000
FY 87	-	\$60,500,000	+	\$2,420,000	=	\$62,920,000
FY 88	-	\$68,400,000	+	\$2,740,000	=	\$71,140,000
FY 89	-	\$75,900,000	+	\$3,040,000	=	\$78,940,000
FY 90	-	\$85,600,000	+	\$3,420,000	=	\$89,020,000
FY 91	-	\$97,200,000	+	\$3,888,000	=	\$101,088,000
FY 92	-	\$108,435,000	+	\$4,337,400	=	\$112,772,400
FY 93	-	\$120,481,000	+	\$4,819,250	=	\$125,300,250
FY 94	-	\$133,280,000	+	\$5,331,200	=	\$138,611,200

March 29, 1984

Total Longevity Bonus Program Costs

CSSB 347 (Fin)

FY 84	Administration	\$ 248,000	GF
	Additional Administration	21,828	GF
	Grants (10,000 x 10 x \$250)	25,000,000	GF
	(14,500 x 2 x \$250)	7,250,000	GF
	Total	<u>\$32,519,828</u>	
FY 85	Administration	\$ 269,400	GF
	Additional Administration	108,312	GF
	Grants (14,500 x 12 x \$250)	38,900,000	PF
		4,600,000	GF
	Total	<u>\$43,877,712</u>	
FY 86	Administration	\$ 269,400	GF
	Additional Administration	87,600	GF
	Grants (15,100 x 12 x \$250)	45,300,000	PF
	Total	<u>\$45,657,000</u>	
FY 87	Administration	\$ 269,400	GF
	Additional Administration	88,600	GF
	Grants (15,700 x 12 x \$250)	47,100,000	PF
	Total	<u>\$47,458,000</u>	
FY 88	Administration	\$ 269,400	GF
	Additional Administration	89,600	GF
	Grants (16,300 x 12 x \$250)	48,900,000	PF
	Total	<u>\$49,259,000</u>	
FY 89	Administration	\$ 269,400	GF
	Additional Administration	90,600	GF
	Grants (16,900 x 12 x \$250)	50,700,000	PF
	Total	<u>\$51,060,000</u>	

Grants Budget
If Longevity Bonus Program Is Unchanged
(based on growth of 60 per month
over present enrollment)

FY 85	10,348 persons @ \$250/mo.	=	\$31,044.0
FY 86	11,068 persons @ \$250/mo.	=	33,204.0
FY 87	11,788 persons @ \$250/mo.	=	35,364.0
FY 88	12,508 persons @ \$250/mo.	=	37,524.0
FY 89	13,228 persons @ \$250/mo.	=	39,684.0
FY 90	13,948 persons @ \$250/mo.	=	41,844.0
FY 91	14,668 persons @ \$250/mo.	=	44,004.0
FY 92	15,388 persons @ \$250/mo.	=	46,164.0
FY 93	16,108 persons @ \$250/mo.	=	48,324.0
FY 94	16,828 persons @ \$250/mo.	=	50,484.0

1.	POSITION TITLE Clerk V				RANGE/STEP 11B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP.
2.	TYPE OF POSITION PFT	STAFF MONTHS 12	RP NUMBER	PCN NUMBER	BRU PRIORITY 1	LOCATION Juneau	ELECTION DISTRICT 4	LEG.		
3.	CONTINUATION LEVEL				JUSTIFICATION					
4.	TYPE OF EXPENDITURE				<p>The program expects to receive applications from 4,152 persons who will meet the new eligibility requirements when the bill is effective. A Clerk V position is required to supervise two PPT Clerk II positions, who will be required to process the volume of applications. In addition, the Clerk V will be responsible for calculation of any retroactive benefits which may be due.</p> <p>At the end of eight months, it is expected that the receipt of applications will level off and the Clerk V position will then be required to assist with actions necessary for continuing eligibility of increased number of recipients, and added volume of data input.</p>					
	1	2	3							
	PERSONAL SERVICES									
5.	Salary	1,914/mo.	22,968							
6.	Benefits		1,454							
7.	Supplemental Benefits		1,408							
8.	Fixed Benefits		2,880							
9.	TOTAL PERSONAL SERVICES		01	28,710						
10.	Travel		02							
11.	Contractual		03							
12.	Commodities		04							
13.	Equipment		05							
14.	Other									
15.	TOTAL COST			28,710						
	RECEIPT CODE	FUNDING SOURCE								
16.		Federal Receipts	1002							
17.		G.F. Match	1003							
18.	100	General Funds	1004	28,710						
19.		I-A Receipts	1005							
20.		Program Receipts	1028							
21.		Other								
FOR B&M USE ONLY										
4A KEY NUMBER										

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BAG. UNIT G	FORM 12	PAGE/LINE	GOV.	APPROV.	DISAPP.
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 2	LOCATION Juneau	ELECTION DISTRICT 4		LEG.		
3.	CONTINUATION LEVEL				JUSTIFICATION						
4.	TYPE OF EXPENDITURE										
	1		2		3						
	PERSONAL SERVICES										
5.	Salary	1,510/mo.			12,080						
6.	Benefits			2,022							
7.	Supplemental Benefits										
8.	Fixed Benefits										
9.	TOTAL PERSONAL SERVICES		01	14,102							
10.	Travel			02							
11.	Contractual			03							
12.	Commodities			04							
13.	Equipment			05							
14.	Other										
15.	TOTAL COST				14,102						
	RECEIPT CODE	FUNDING SOURCE									
16.		Federal Receipts 1002									
17.		G.F. Match 1003									
18.	100	General Funds 1004		14,102							
19.		I-A Receipts 1005									
20.		Program Receipts 1028									
21.		Other									
FOR B&M USE ONLY											
4A KEY NUMBER _____											

The program expects to receive applications from 4,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.

Two permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

FY 85

Page _____ of _____
Revised Date _____

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12	PAGE/LINE	GOV.	APPROV.	DISAPP.																								
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 3	LOCATION Juneau	ELECTION DISTRICT 4		LEG.																										
3.	CONTINUATION LEVEL				JUSTIFICATION																														
4.	TYPE OF EXPENDITURE																																		
	1			2		3																													
	PERSONAL SERVICES																																		
5.	Salary	1.510/mo.		12,080																															
6.	Benefits			2,022																															
7.	Supplemental Benefits																																		
8.	Fixed Benefits																																		
9.	TOTAL PERSONAL SERVICES			01	14,102																														
10.	Travel			02																															
11.	Contractual			03																															
12.	Commodities			04																															
13.	Equipment			05																															
14.	Other																																		
15.	TOTAL COST				14,102																														
<table border="1"> <thead> <tr> <th>RECEIPT CODE</th> <th>FUNDING SOURCE</th> <th>AMOUNT</th> </tr> </thead> <tbody> <tr> <td>16.</td> <td>Federal Receipts 1002</td> <td></td> </tr> <tr> <td>17.</td> <td>G.F. Match 1003</td> <td></td> </tr> <tr> <td>18.</td> <td>100 General Funds 1004</td> <td>14,102</td> </tr> <tr> <td>19.</td> <td>I-A Receipts 1005</td> <td></td> </tr> <tr> <td>20.</td> <td>Program Receipts 1028</td> <td></td> </tr> <tr> <td>21.</td> <td>Other</td> <td></td> </tr> </tbody> </table>												RECEIPT CODE	FUNDING SOURCE	AMOUNT	16.	Federal Receipts 1002		17.	G.F. Match 1003		18.	100 General Funds 1004	14,102	19.	I-A Receipts 1005		20.	Program Receipts 1028		21.	Other				
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FOR B&M USE ONLY																																			
4 A KEY NUMBER _____																																			

The program expects to receive applications from 4,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.

Two permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

FY 85

Page _____ of _____
Revised Date _____



From The
**SENATE
FINANCE COMMITTEE**

MEMO

TO: File - SB 347 (Longevity Bonus)

DATE: March 22, 1984

Prior to receipt of attached correspondence, received a phone call from Rebecca Burch, Dept. of Admin., explaining that the fiscal note reported out of committee was submitted without approving signature by the Commissioner. I told her that for committee purposes signature by Mr. Keller of Pioneer Benefits was sufficient. Double checked this with Becky and Michael in Sen. Mulcahy's office since Sen. Mulcahy carried the bill in committee. All agreed that resubmission of basically the same note reported out of committee but bearing two signatures was not necessary.

Max agreed that no fiscal notes should be pulled from the bill since they provide a historical record. No action was taken as a result of correspondence nor was it responded to.

kathy

STATE OF ALASKA

Bill Sheffield, Governor

DEPARTMENT OF ADMINISTRATION

OFFICE OF THE COMMISSIONER

POUCH C
JUNEAU, ALASKA 99811
PHONE:

March 16, 1984

House & Senate Finance Committees
Alaska State Legislature
Pouch V MS#3100
Juneau, AK 99811

This is to request that all fiscal notes for CSSB 347 Longevity Bonus prior to the revised version under date of February 27, 1984 as signed by Acting Commissioner Anselm Staack be withdrawn.

Thank you very much.

Sincerely,



Rebecca Burch
Special Assistant
to Commissioner Rudd

RB/tc

attachment

cc: The Honorable Bill Ray
Alaska State Legislature

Senate State Affairs

House State Affairs

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: February 27, 1984

REQUEST

Bill/Resolution No.: CSSB 347

Title: Permanent Fund/Longevity

Bonus

Sponsor: Ray

Requestor: Mulcahy

Date of Request: February 24, 1984

FISCAL DETAIL

Agency Affected: Administration

Program Category Affected: Social Services

BRU, Program or Subprogram(s) Affected:

Longevity Bonus Program

TABLE OF CONTENTS

Fiscal Note	Page 1 of 12
Fiscal Note Explanation Sheet	Page 2 of 12
Fiscal Note Analysis	Page 3 of 12
Analysis of Additional Costs	Page 4 of 12
Permanent Funds Available	Page 5 of 12
Costs of Program (By Year)	Page 6 of 12
Grants (Bonus) Budget Projections	Page 7 of 12
Existing Proposed FY 85 Budget	Page 8 of 12

Additional Information

Explanation Sheet Based on \$200 Bonus Payments	Page 9 of 12
Fiscal Note Analysis Based on \$200 Bonus Payments	Page 10 of 12
Analysis of Additional Costs Based on \$200 Bonus Payments	Page 11 of 12
Total Costs Based on \$200 Bonus Payments	Page 12 of 12

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: February 27, 1984
Page 1 of 12

<u>REQUEST</u> Bill/Resolution No.: <u>CSSB 347</u> Title: <u>Permanent Fund/Longevity Bonus</u>	<u>FISCAL DETAIL</u> Agency Affected: <u>Administration</u> Program Category Affected: <u>Social Services</u>
Sponsor: <u>Ray</u> Requestor: <u>Mulcahy</u> Date of Request: <u>February 24, 1984</u>	BRU, Program of Subprogram(s) Affected: <u>Longevity Bonus Program</u>

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES		49.9	28.7	28.7	28.7	28.7
200 TRAVEL						
300 CONTRACTUAL		56.9	57.9	58.9	59.9	60.9
400 SUPPLIES		1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 GRANTS, CLAIMS, ETC		12,456.0	12,096.0	11,736.0	11,376.0	11,016.0
800 MISCELLANEOUS						
TOTAL OPERATING	0	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND		(26,335.7)	(33,116.4)	(35,275.4)	(37,434.4)	(39,593.4)
FEDERAL FUNDS						
OTHER (Permanent Fund)		38,900.0	45,300.0	47,100.0	48,900.0	50,700.0
TOTAL	0	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6

POSITIONS:

FULL-TIME	0	1.0	1.0	1.0	1.0	1.0
PART-TIME	0	1.0	0	0	0	0
TEMPORARY	0	0	0	0	0	0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL: In FY 85 there would be an expenditure of \$38,900.0 in Permanent Fund Distributable Income and a reduction in the Longevity Bonus General Funds Budget of \$26,335.7. In succeeding years Permanent Funds would increase and General Funds would decrease.

ANALYSIS: Attach a separate page for any Analysis.

Prepared By: E. Louis Keller, Director Phone: (907) 465-4400
 Division: Pioneers' Benefits Date: February 27, 1984

Approved by Commissioner: Lisa Rudd Date: 2-28-84
 Agency: DEPARTMENT OF ADMINISTRATION

Distribution (by Agency preparing fiscal note):
 Legislative Finance
 Legislative Sponsor
 Requestor
 Office of Management and Budget
 Impacted Agency(ies)

CSSB 347 .

Fiscal Note Explanation Sheet (FY 85 only)
 Prepared by Division of Pioneers' Benefits

Department of Administration .

February 27, 1984

Budget Categories: (Longevity Bonus Program)	Existing proposed budget (Governor) as follows: Column 1) FY 85 as proposed based on August 1983 projections of 11,208 recipients. Column 2) Adjustment based on February 1984 projections of 10,348 recipients. Column 3) Revised FY 85 proposed budget.			Additional cost of Longevity Bonus Program under CSSB 347 and by funding source (as shown on the fiscal note, page 1):			Reconciliation:		
	1) Totals (all G.F.*)	2) Adjust-ment**	3) Revised Totals	G.F.	P.F.°	Total	G.F.	P.F.	Total
100 Personal Services	175.6		175.6	49.9		49.9	225.5		225.5
200 Travel	4.0		4.0				4.0		4.0
300 Contractual	85.6		85.6	56.9		56.9	142.5		142.5
400 Supplies	3.5		3.5	1.5		1.5	5.0		5.0
500 Equipment	.7		.7				.7		.7
700 Grants	32,551.5	(1,507.5)	31,044.0	(26,335.7)°	12,456.0	12,456.0	4,600.0	38,900.0	43,500.0
Totals	32,820.9	(1,507.5)	31,313.4	108.3	12,456.0	12,564.3	4,977.7	38,900.0	43,877.7+

* G.F. = General Fund.

**Based on revised estimate of 10,348 recipients in FY 85.

° P.F. = Permanent Fund.

+ \$26,335.7 is a reduction in expenditures from the General Fund and is not carried into the totals of this column (for information only).

Total cost of Longevity Bonus Program should CSSB 347 become law (FY 85 only).

CSSB 347
Fiscal Note Analysis
Prepared By Division of Pioneers' Benefits
Department of Administration
February 27, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

This fiscal note was requested to be prepared using the following assumptions:

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications.

There will be approximately 10,348 persons on the Longevity Bonus program by July 1, 1984. Therefore, it is assumed, as requested using the February 22 information, that an additional 4,152 persons will be enrolled on the program in FY 85 under the bill.

- c. The amount of the bonus would be \$250 per month. According to calculations of Permanent Fund Distributable Income issued by the Department of Revenue in January of 1984, only \$38.9 million would be available for credit to the Longevity Bonus account in FY 85. This amount would fund only 12,967 persons, rather than 14,500. Therefore, the additional \$4.6 million needed to fund 14,500 persons would have to be obtained from another source.
- d. No retroactive payments would be paid.
- e. The program would continue to grow at the rate of approximately 50 per month, after the initial group of persons are enrolled who would be made eligible by the one-year residency requirement.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) would be paid from the General Fund. Bonus payments would be paid from the Longevity Bonus Account established from earnings of the Permanent Fund, except for the additional \$4.6 million needed, which would be paid from the General Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on July 1, 1984.

CSSE 347
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Additional funds needed for FY 85 are computed as follows:

		<u>Annual Cost</u>
Personal Services		\$ 49,862
Clerk V, PFT	\$28,710	
Clerk II, PPT (2 positions, 6 months)	21,152	
Contractual Services		
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls		56,950
Commodities		1,500
Office supplies and file cabinets for application and recipient files		
Grants		
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 12 x 5250)		12,456,000
Total additional funds required for FY 85		<hr/> \$12,564,312

November 9, 1984

Permanent Funds Available for
Longevity Bonus Grants
(CSSB 347)

		<u>Earnings</u>		<u>Interest</u>		
FY 85	-	\$37,400,000	+	\$1,500,000	=	\$38,900,000
FY 86	-	\$48,900,000	+	\$1,960,000	=	\$50,860,000
FY 87	-	\$60,500,000	+	\$2,420,000	=	\$62,920,000
FY 88	-	\$68,400,000	+	\$2,740,000	=	\$71,140,000
FY 89	-	\$75,900,000	+	\$3,040,000	=	\$78,940,000
FY 90	-	\$85,600,000	+	\$3,420,000	=	\$89,020,000
FY 91	-	\$97,200,000	+	\$3,888,000	=	\$101,088,000
FY 92	-	\$108,435,000	+	\$4,337,400	=	\$112,772,400
FY 93	-	\$120,481,000	+	\$4,819,250	=	\$125,300,250
FY 94	-	\$133,280,000	+	\$5,331,200	=	\$138,611,200

February 24, 1984

Total Longevity Bonus Program Costs (Actual)

(CSSB 347)

FY 85	Administration (reg.)	\$ 269,400	GF
	Additional Administration	108,312	GF
	Grants (14,500 x 12 x \$250)	38,900,000	PF
		4,600,000	GF
	Total	<u>\$43,877,712</u>	
FY 86	Administration	\$ 269,400	GF
	Additional Administration	87,600	GF
	Grants (15,100 x 12 x \$250)	45,300,000	PF
	Total	<u>\$45,657,000</u>	
FY 87	Administration	\$ 269,400	GF
	Additional Administration	88,600	GF
	Grants (15,700 x 12 x \$250)	47,100,000	PF
	Total	<u>\$47,458,000</u>	
FY 88	Administration	\$ 269,400	GF
	Additional Administration	89,600	GF
	Grants (16,300 x 12 x \$250)	48,900,000	PF
	Total	<u>\$49,259,000</u>	
FY 89	Administration	\$ 269,400	GF
	Additional Administration	90,600	GF
	Grants (16,900 x 12 x \$250)	50,700,000	PF
	Total	<u>\$51,060,000</u>	

Grants Budget
If Longevity Bonus Program Is Unchanged
(based on growth of 60 per month
over present enrollment)

FY 85	10,348 persons @ \$250/mo.	=	\$31,044.0
FY 86	11,068 persons @ \$250/mo.	=	33,204.0
FY 87	11,788 persons @ \$250/mo.	=	35,364.0
FY 88	12,508 persons @ \$250/mo.	=	37,524.0
FY 89	13,228 persons @ \$250/mo.	=	39,684.0
FY 90	13,948 persons @ \$250/mo.	=	41,844.0
FY 91	14,668 persons @ \$250/mo.	=	44,004.0
FY 92	15,388 persons @ \$250/mo.	=	46,164.0
FY 93	16,108 persons @ \$250/mo.	=	48,324.0
FY 94	16,828 persons @ \$250/mo.	=	50,484.0

03-02-04 10 (02-22-3-07-00-00)

STATE OF ALASKA -- COMPONENT_BUDGET_SUMMARY

07157

1/03/84

AGENCY: DEPARTMENT OF ADMINISTRATION
CATEGORY: SOCIAL SERVICESPROGRAM: LONGEVITY BONUS
SUB-PROGRAM: LONGEVITY BONUS

EXPENDITURES & FUNDING	83 AUTH	83 FINAL	83 ACT	84 AUTH	ADJ BASE	85 SL 1	85 SL 2	85 SL 3	85 SL 4	GOVERNOR
01 PERS. SERV.	156.6	156.6	169.4	159.4	164.7	175.6	161.0	161.0	175.6	175.6
02 TRAVEL	4.4	4.4	1.7	4.0	4.0	4.0	3.8	3.8	4.0	4.0
03 CONTRACTUAL	106.0	106.0	84.6	81.1	81.1	81.1	77.0	77.0	85.6	85.6
04 SUPPLIES	3.5	3.5	1.0	3.5	3.5	3.5	3.3	3.3	3.5	3.5
05 EQUIPMENT			.4						.7	.7
06 LANDS/BLDGS										
07 GRANTS, CLMS	27944.0	27944.0	27504.5	30211.5	30211.5	29749.5	26963.8	27468.1	32551.5	32551.5
08 MISC.										
* TOTAL EXPEND	28214.5	28214.5	27761.4	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
09 I-A TRANSFER	26.1	26.1	26.1	2.1		24.7	23.4	23.4	26.2	26.2
FED. RECEIPT										
**GF + MATCH	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
G. F. MATCH										
GENERAL FUND	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
PGM RECEIPTS										
I/A RECEIPTS										
OTHER FUNDS										
15 FULL-TIME	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
16 PART-TIME										
17 TEMPORARY										

000042A

Informational Only:
 BASED ON \$200 PER
 MONTH LONGEVITY BONUS

CSSB 347
 Fiscal Note Explanation Sheet (FY 85 only)
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Budget Categories: (Longevity Bonus Program)	Adjusted proposed FY 85 budget			Additional cost of Longevity Bonus Program under CSSB 347 by funding source			Reconciliation: Total cost of Program		
	Total (All G.F.)*	Adjustment**	Revised Total	G.F.	P.F.°	Total	G.F.	P.F.	Total
100 Personal Services	175.6		175.6	49.9		49.9	225.5		225.5
200 Travel	4.0		4.0				4.0		4.0
300 Contractual	85.6		85.6	56.9		56.9	142.5		142.5
400 Supplies	3.5		3.5	1.5		1.5	5.0		5.0
500 Equipment	.7		.7				.7		.7
700 Grants	32,551.5	(1,507.5)	31,044.0	(30,935.7)°	3,756.0	3,756.0		34,800.0	34,800.0
Totals	32,820.9	(1,507.5)	31,313.4	108.3	3,756.0	3,864.3	377.7	34,800.0	35,177.7

* G.F. = General Fund.

**Based on revised estimate of 10,348 recipients in FY 85.

° P.F. = Permanent Fund.

°°\$30,935.7 is a reduction in expenditures from the General Fund and is not carried into the totals of this column (for information only).

+ Total cost of Longevity Bonus Program should CSSB 347 become law (FY 85 only) based on payments of \$200 per month.

CSSB 347
Fiscal Note Analysis
Prepared By Division of Pioneers' Benefits
Department of Administration
February 27, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

This fiscal note was requested to be prepared using the following assumptions:

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications.

There will be approximately 10,348 persons on the Longevity Bonus program by July 1, 1984. Therefore, it is assumed, as requested using the February 22 information, that an additional 4,152 persons will be enrolled on the program in FY 85 under the bill.

- c. The amount of the bonus would be \$200 per month. According to calculations of Permanent Fund Distributable Income issued by the Department of Revenue in January of 1984, \$38.9 million would be available for credit to the Longevity Bonus account in FY 85. At \$200 per month only \$34.8 million would be required, leaving an unspent balance of \$4.1 million in FY 85.
- d. No retroactive payments would be paid.
- e. The program would continue to grow at the rate of approximately 50 per month, after the initial group of persons are enrolled who would be made eligible by the one-year residency requirement.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) would be paid from the General Fund. Bonus payments would be paid from the Longevity Bonus Account established from earnings of the Permanent Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on July 1, 1984.

CSSB 347
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 49,862
Clerk V, PFT	\$28,710
Clerk II, PPT (2 positions, 6 months)	21,152
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	56,950
Commodities	1,500
Office supplies and file cabinets for application and recipient files	
Grants	9,964,800
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 12 x \$200	
Difference in cost per month for those already enrolled on July 1, 1984 (\$50 x 12 x 10,348)	(6,208,800)
Total additional funds required for FY 85	<u>\$ 3,864,312</u>

February 27, 1984

Total Longevity Bonus Program Costs (Actual)

(CSSB 347)

FY 85	Administration (reg.)	\$ 269,400	GF
	Additional Administration	108,312	GF
	Grants (14,500 x 12 x \$200)	34,800,000	PF
	Total	<u>\$35,177,712</u>	
FY 86	Administration	\$ 269,400	GF
	Additional Administration	87,600	GF
	Grants (15,100 x 12 x \$200)	36,240,000	PF
	Total	<u>\$36,597,000</u>	
FY 87	Administration	\$ 269,400	GF
	Additional Administration	88,600	GF
	Grants (15,700 x 12 x \$200)	37,680,000	PF
	Total	<u>\$38,038,000</u>	
FY 88	Administration	\$ 269,400	GF
	Additional Administration	89,600	GF
	Grants (16,300 x 12 x \$200)	39,120,000	PF
	Total	<u>\$39,479,000</u>	
FY 89	Administration	\$ 269,400	GF
	Additional Administration	90,600	GF
	Grants (16,900 x 12 x \$200)	40,560,000	PF
	Total	<u>\$40,920,000</u>	

COMMITTEE REPORT
SENATE

FURTHER:

Date 2/28/84

Mr. President

The Committee on FINANCE considered SB 347

recognizing the use of Alaska permanent fund income to pay 100% of the expenses of the long-term care program and the permanent fund distribution program; and

and (a majority of the committee) (the committee) reports it back with the following recommendations:

- do pass
- do pass with attached amendment(s)
- replace with/or adopt CS for SB 347 (Fin)
- new title
- same title and ^{majority} recommends Do Pass
- and attached a "LETTER OF INTENT" NEW FISCAL NOTE
- reports it back without recommendation
- recommends referral to _____ Committee

MEMBERS SIGNING
DO PASS

MEMBERS HAVING
OTHER RECOMMENDATIONS

Chairman

Chairman recommendation

Original sponsors: Ray and Kerttula

1 IN THE SENATE

BY THE FINANCE COMMITTEE

2 CS FOR SENATE BILL NO. 347 (Finance)

3 IN THE LEGISLATURE OF THE STATE OF ALASKA

4 THIRTEENTH LEGISLATURE - SECOND SESSION

5 A BILL

6 For an Act entitled: "An Act authorizing the use of Alaska permanent fund
7 income to pay longevity bonuses; amending the longev-
8 ity bonus program and the permanent fund dividend
9 distribution program; and providing for an effective
10 date."

11 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF ALASKA:

12 * Section 1. AS 37.13 is amended by adding a new section to read:

13 Sec. 37.13.147. LONGEVITY BONUS ACCOUNT. (a) The longevity
14 bonus account is established as a separate account in the Alaska per-
15 manent fund. Notwithstanding the provisions of AS 37.13.145, 12.5
16 percent of the income of the permanent fund earned during the fiscal
17 year ending on June 30 of the current year that is available for dis-
18 tribution under AS 37.13.140 shall be credited to the longevity bonus
19 account.

20 (b) Money in the longevity bonus account shall be invested in
21 investments authorized under AS 37.13.120. The longevity bonus ac-
22 count shall be credited with earnings at an interest rate equal to the
23 average rate of interest earned on the Alaska permanent fund.

24 (c) The legislature may annually appropriate an amount suffi-
25 cient to pay monthly longevity bonuses for the subsequent fiscal year
26 under AS 47.45.010 from the longevity bonus account to the Alaska
27 longevity bonus fund established under AS 47.45.090.

28 * Sec. 2. AS 43.23.045(b) is amended to read:

29 (b) Notwithstanding any contrary provision of law, each year the

1 commissioner shall transfer to the dividend fund 37.5 [50] percent of
2 the income of the Alaska permanent fund earned during the fiscal year
3 ending on June 30 of the current year and available for distribution.

4 * Sec. 3. AS 47.45.010 is amended to read:

5 Sec. 47.45.010. PERSONS WHO MAY QUALIFY FOR LONGEVITY BONUS.

6 (a) A person who is 65 years of age or over, who has been a resident
7 of the state for at least one year immediately preceding the applica-
8 tion for a longevity bonus under this chapter [WAS DOMICILED IN THE
9 TERRITORY ON OR BEFORE JANUARY 3, 1959 AND WHO HAS MAINTAINED A CON-
10 TINUOUS DOMICILE IN THE TERRITORY OR STATE FOR 25 YEARS] may apply to
11 the commissioner of administration for qualification to receive a
12 monthly bonus of \$250.

13 (b) When the commissioner of administration determines that an
14 applicant qualifies under AS 47.45.010 - 47.45.170 the commissioner
15 [HE] shall immediately begin payment of the bonus.

16 (c) A person who otherwise qualifies to receive a bonus provided
17 for in AS 47.45.010 - 47.45.170 may continue to do so only as long as
18 that person continues to be a resident of [HE CONTINUOUSLY RETAINS A
19 DOMICILE IN] the state.

20 * Sec. 4. AS 47.45.030 is amended to read:

21 Sec. 47.45.030. ABSENCE FROM THE STATE. After qualification a
22 [A] recipient shall notify the commissioner of administration when the
23 recipient [HE] expects to be absent from the state if the absence is
24 for a continuous period that exceeds 30 days. After that notifica-
25 tion, the recipient shall no longer receive bonuses from the Depart-
26 ment of Administration after the [HIS] last regularly approved monthly
27 application. Upon returning [HIS RETURN] to the state the recipient
28 [HE] may again make application for a bonus. Whenever the absence is
29 for a continuous period that exceeds 180 days the recipient shall be

1 disqualified from receiving bonuses for the next 12 calendar months
2 after returning [HIS RETURN] to the state. However, when the commis-
3 sioner of administration determines a period of absence is beyond the
4 control of the recipient, the recipient [HE] may not be disqualified,
5 if the recipient [HE] still otherwise qualifies upon returning [HIS
6 RETURN] to the state. Continual absences from the state, even though
7 reported, and failure to notify the commissioner of an expected ab-
8 sence may be grounds for disqualification.

9 * Sec. 5. AS 47.45.090 is repealed and reenacted to read:

10 Sec. 47.45.090. ALASKA LONGEVITY BONUS FUND. The Alaska longev-
11 ity bonus fund is established for the purpose of paying the monthly
12 bonuses provided for in this chapter. The fund consists of money
13 appropriated to the fund by the state legislature from the longevity
14 bonus account established under AS 37.13.147.

15 * Sec. 6. AS 47.45 is amended by adding a new section to read:

16 Sec. 47.45.145. ACCESS TO RECORDS. (a) Notwithstanding any
17 contrary provision of state law or state agency regulation, the com-
18 missioner of administration may have access to and examine records,
19 documents, or other information in the possession of a state agency,
20 other than personal income tax returns filed under AS 43.20, if the
21 records, documents, or information relate to the length of state
22 residence of an applicant for, or a recipient of, a monthly bonus
23 under this chapter.

24 (b) If the commissioner of administration receives confidential
25 information under (a) of this section, that information may be used
26 only to confirm or rebut an applicant's declaration of length of state
27 residence. If a person discloses information obtained under this
28 section for a purpose other than to rebut an applicant's declaration
29 of length of state residence in an appropriate administrative or

1 judicial proceeding, that person is subject to the penalty that ap-
2 plies to unauthorized disclosure of that information by the agency or
3 person that has primary custody and control of the information.

4 * Sec. 7. AS 47.45.150 is amended by adding a new paragraph to read:

5 (3) "resident" or "resident of the state" means an indi-
6 vidual who is physically present in the state with the intent to
7 remain in the state indefinitely and to make a home in the state. A
8 person demonstrates the requisite intent only by maintaining a princi-
9 pal place of abode in the state for the one year required by AS 47.-
10 45.010(a) and by providing other proof of intent the commissioner may
11 require by regulation, including proof that the person is not claiming
12 residency outside the state or obtaining benefits under a claim of
13 residency outside the state.

14 * Sec. 8. AS 47.45.170 is repealed and reenacted to read:

15 Sec. 47.45.170. FINDINGS AND PURPOSE. The legislature finds and
16 declares that

17 (1) the high cost of goods and services in Alaska and the
18 state's remoteness and harsh environment, make it difficult for many
19 elderly Alaskans to remain in the state after retirement;

20 (2) when a person is forced to live out retirement years
21 away from home, family and friends, that person suffers an irreparable
22 loss;

23 (3) Alaska's elderly are a precious human resource, and it
24 is in the public interest to provide a financial incentive for them to
25 remain in the state after retirement;

26 (4) as oil revenues decrease, it will become increasingly
27 difficult for the legislature to fund the longevity bonus program
28 through annual appropriations and the income of the Alaska permanent
29 fund is an appropriate source of funding for the longevity bonus

1 program; and

2 (5) it is in the public interest to continue the longevity
3 bonus program for all elderly Alaskans irrespective of need. The
4 longevity bonus program is not a form of welfare, and is not a substi-
5 tute for or supplement to public assistance. Other programs are
6 available to provide the basic necessities of life. The longevity
7 bonus program is intended only to encourage elderly Alaskans to spend
8 their retirement years in the comfort of their homes.

9 * Sec. 9. AS 47.45.150(2) and sec. 2, ch. 205, SLA 1972 are repealed.

10 * Sec. 10. This Act only takes effect if the Alaska Supreme Court
11 affirms the decision of the superior court in the case of Rodney Vest et al
12 v. Marian Schafer and State of Alaska, No. 1JU-82-1103 CIV, Superior Court
13 for the State of Alaska, First Judicial District at Juneau, on the consti-
14 tutionality of the Alaska longevity bonus program; in that event this Act
15 takes effect 30 days after the date of the final decision of the Alaska
16 Supreme Court.

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: February 27, 1984

REQUEST

Bill/Resolution No.: CSSB 347

Title: Permanent Fund/Longevity
Bonus

Sponsor: Ray

Requestor: Mulcahy

Date of Request: February 24, 1984

FISCAL DETAIL

Agency Affected: Administration

Program Category Affected: Social Services

BRU, Program or Subprogram(s) Affected:
Longevity Bonus Program

TABLE OF CONTENTS

Fiscal Note	Page 1 of 12
Fiscal Note Explanation Sheet	Page 2 of 12
Fiscal Note Analysis	Page 3 of 12
Analysis of Additional Costs	Page 4 of 12
Permanent Funds Available	Page 5 of 12
Costs of Program (By Year)	Page 6 of 12
Grants (Bonus) Budget Projections	Page 7 of 12
Existing Proposed FY 85 Budget	Page 8 of 12

Additional Information

Explanation Sheet Based on \$200 Bonus Payments	Page 9 of 12
Fiscal Note Analysis Based on \$200 Bonus Payments	Page 10 of 12
Analysis of Additional Costs Based on \$200 Bonus Payments	Page 11 of 12
Total Costs Based on \$200 Bonus Payments	Page 12 of 12

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: February 27, 1984
Page 1 of 12

REQUEST

Bill Resolution No.: CSSB 347
Title: Permanent Fund/Longevity Bonus

Sponsor: Ray
Requestor: Mulcahy
Date of Request: February 24, 1984

FISCAL DETAIL

Agency Affected: Administration
Program Category Affected: Social Services

BRU, Program of Subprogram(s) Affected:
Longevity Bonus Program

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES		49.9	28.7	28.7	28.7	28.7
200 TRAVEL						
300 CONTRACTUAL		56.9	57.9	58.9	59.9	60.9
400 SUPPLIES		1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 GRANTS, CLAIMS, ETC		12,456.0	12,096.0	11,736.0	11,376.0	11,016.0
800 MISCELLANEOUS						
TOTAL OPERATING	0	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND		(26,335.7)	(33,116.4)	(35,275.4)	(37,434.4)	(39,593.4)
FEDERAL FUNDS						
OTHER (Permanent Fund)		38,900.0	45,300.0	47,100.0	48,900.0	50,700.0
TOTAL	0	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6

POSITIONS:

FULL-TIME	0	1.0	1.0	1.0	1.0	1.0
PART-TIME	0	1.0	0	0	0	0
TEMPORARY	0	0	0	0	0	0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL: In FY 85 there would be an expenditure of \$38,900.0 in Permanent Fund Distributable Income and a reduction in the Longevity Bonus General Funds Budget of \$26,335.7. In succeeding years Permanent Funds would increase and General Funds would decrease.

ANALYSIS: Attach a separate page for any Analysis.

Prepared By: E. Louis Keller, Director
Division: Pioneers' Benefits

Phone: (907) 465-4400
Date: February 27, 1984

Approved by Commissioner: Lisa Rudd
Agency: DEPARTMENT OF ADMINISTRATION

Date: _____

Distribution (by Agency preparing fiscal note):
Legislative Finance
Legislative Sponsor
Requestor
Office of Management and Budget
Impacted Agency(ies)

CSSB 347

Fiscal Note Explanation Sheet (FY 85 only)
Prepared by Division of Pioneers' Benefits

Department of Administration

February 27, 1984

Budget Categories: (Longevity Bonus Program)	Existing proposed budget (Governor) as follows: Column 1) FY 85 as proposed based on August 1983 projections of 11,208 recipients. Column 2) Adjustment based on February 1984 projections of 10,348 recipients. Column 3) Revised FY 85 proposed budget.			Additional cost of Longevity Bonus Program under CSSB 347 and by funding source (as shown on the fiscal note, page 1):			Reconciliation: a. Total cost of program; b. Including existing proposed FY 85 adjusted budget; c. Additional cost under CSSB 347 and; d. By funding source.		
	1) Totals (all G.F.*)	2) Adjust-ment**	3) Revised Totals	G.F.	P.F. ^o	Total	G.F.	P.F.	Total
100 Personal Services	175.6		175.6	49.9		49.9	225.5		225.5
200 Travel	4.0		4.0				4.0		4.0
300 Contractual	85.6		85.6	56.9		56.9	142.5		142.5
400 Supplies	3.5		3.5	1.5		1.5	5.0		5.0
500 Equipment	.7		.7				.7		.7
700 Grants	32,551.5	(1,507.5)	31,044.0	(26,335.7) ^o	12,456.0	12,456.0	4,600.0	38,900.0	43,500.0
Totals	32,820.9	(1,507.5)	31,313.4	108.3	12,456.0	12,564.3	4,977.7	38,900.0	43,877.7+

G.F. = General Fund.

^oBased on revised estimate of 10,348 recipients in FY 85.

P.F. = Permanent Fund.

^o26,335.7 is a reduction in expenditures from the General Fund and is not carried into the totals of this column (for information only).

⁺Additional cost of Longevity Bonus Program should CSSB 347 become law (FY 85 only).

CSSB 347
Fiscal Note Analysis
Prepared By Division of Pioneers' Benefits
Department of Administration
February 27, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

This fiscal note was requested to be prepared using the following assumptions:

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications.

There will be approximately 10,348 persons on the Longevity Bonus program by July 1, 1984. Therefore, it is assumed, as requested using the February 22 information, that an additional 4,152 persons will be enrolled on the program in FY 85 under the bill.

- c. The amount of the bonus would be \$250 per month. According to calculations of Permanent Fund Distributable Income issued by the Department of Revenue in January of 1984, only \$38.9 million would be available for credit to the Longevity Bonus account in FY 85. This amount would fund only 12,967 persons, rather than 14,500. Therefore, the additional \$4.6 million needed to fund 14,500 persons would have to be obtained from another source.
- d. No retroactive payments would be paid.
- e. The program would continue to grow at the rate of approximately 50 per month, after the initial group of persons are enrolled who would be made eligible by the one-year residency requirement.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) would be paid from the General Fund. Bonus payments would be paid from the Longevity Bonus Account established from earnings of the Permanent Fund, except for the additional \$1.6 million needed, which would be paid from the General Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on July 1, 1984.

CSSB 347
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 49,862
Clerk V, PFT	\$23,710
Clerk II, PPT (2 positions, 6 months)	21,152
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	56,950
Commodities	1,500
Office supplies and file cabinets for application and recipient files	
Grants	
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 12 x \$250)	12,456,000
Total additional funds required for FY 85	\$12,564,312

November 9, 1984

Permanent Funds Available for
Longevity Bonus Grants
(CSSB 347)

		<u>Earnings</u>		<u>Interest</u>		
FY 85	-	\$37,400,000	+	\$1,500,000	=	\$38,900,000
FY 86	-	\$48,900,000	+	\$1,960,000	=	\$50,860,000
FY 87	-	\$60,500,000	+	\$2,420,000	=	\$62,920,000
FY 88	-	\$68,400,000	+	\$2,740,000	=	\$71,140,000
FY 89	-	\$75,900,000	+	\$3,040,000	=	\$78,940,000
FY 90	-	\$85,600,000	+	\$3,420,000	=	\$89,020,000
FY 91	-	\$97,200,000	+	\$3,888,000	=	\$101,088,000
FY 92	-	\$103,435,000	+	\$4,337,400	=	\$112,772,400
FY 93	-	\$120,481,000	+	\$4,819,250	=	\$125,300,250
FY 94	-	\$133,280,000	+	\$5,331,200	=	\$138,611,200

February 24, 1984

Total Longevity Bonus Program Costs (Actual)

(CSSB 347)

FY 85	Administration (reg.)	\$ 269,400	GF
	Additional Administration	108,312	GF
	Grants (14,500 x 12 x \$250)	38,900,000	PF
		<u>4,600,000</u>	GF
	Total	\$43,877,712	
FY 86	Administration	\$ 269,400	GF
	Additional Administration	87,600	GF
	Grants (15,100 x 12 x \$250)	45,300,000	PF
	Total	<u>\$45,657,000</u>	
FY 87	Administration	\$ 269,400	GF
	Additional Administration	88,600	GF
	Grants (15,700 x 12 x \$250)	47,100,000	PF
	Total	<u>\$47,458,000</u>	
FY 88	Administration	\$ 269,400	GF
	Additional Administration	89,600	GF
	Grants (16,300 x 12 x \$250)	48,900,000	PF
	Total	<u>\$49,259,000</u>	
FY 89	Administration	\$ 269,400	GF
	Additional Administration	90,600	GF
	Grants (16,900 x 12 x \$250)	50,700,000	PF
	Total	<u>\$51,060,000</u>	

Grants Budget
If Longevity Bonus Program Is Unchanged
(based on growth of 60 per month
over present enrollment)

FY 85	10,348 persons @ \$250/mo.	=	\$31,044.0
FY 86	11,068 persons @ \$250/mo.	=	33,204.0
FY 87	11,788 persons @ \$250/mo.	=	35,364.0
FY 88	12,508 persons @ \$250/mo.	=	37,524.0
FY 89	13,228 persons @ \$250/mo.	=	39,684.0
FY 90	13,948 persons @ \$250/mo.	=	41,844.0
FY 91	14,668 persons @ \$250/mo.	=	44,004.0
FY 92	15,388 persons @ \$250/mo.	=	46,164.0
FY 93	16,108 persons @ \$250/mo.	=	48,324.0
FY 94	16,828 persons @ \$250/mo.	=	50,484.0

03-02-04-00-00 (02-22-3-07-00-00)

STATE OF ALASKA -- COMPONENT_BUDGET_SUMMARY

07157

1/03/84

AGENCY: DEPARTMENT OF ADMINISTRATION
CATEGORY: SOCIAL SERVICESPROGRAM: LONGEVITY BONUS
SUB-PROGRAM: LONGEVITY BONUS

EXPENDITURES & FUNDING	83 AUTH	83 FINAL	83 ACT	84 AUTH	ADJ BASE	85 SL 1	85 SL 2	85 SL 3	85 SL 4	GOVERNOR
01 PERS. SERV.	156.6	156.6	169.4	159.4	164.7	175.6	161.0	161.0	175.6	175.6
02 TRAVEL	4.4	4.4	1.7	4.0	4.0	4.0	3.8	3.8	4.0	4.0
03 CONTRACTUAL	106.0	106.0	84.6	81.1	81.1	81.1	77.0	77.0	85.6	85.6
04 SUPPLIES	3.5	3.5	1.0	3.5	3.5	3.5	3.3	3.3	3.5	3.5
05 EQUIPMENT			.4						.7	.7
06 LANDS/BLDGS										
07 GRANTS, CLMS	27944.0	27944.0	27504.5	30211.5	30211.5	29749.5	26963.8	27468.1	32551.5	32551.5
08 MISC.										
** TOTAL EXPEND	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
09 I-A TRANSFER	26.1	26.1	26.1	2.1		24.7	23.4	23.4	26.2	26.2
FED. RECEIPT										
**GF + MATCH	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
G. F. MATCH GENERAL FUND PGH RECEIPTS I/A RECEIPTS OTHER FUNDS	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
15 FULL-TIME	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
16 PART-TIME										
17 TEMPORARY										

000042A

Informational Only:
 BASED ON \$200 PER
 MONTH LONGEVITY BONUS

CSSB 347
 Fiscal Note Explanation Sheet (FY 85 only)
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Budget Categories: (Longevity Bonus Program)	Adjusted proposed FY 85 budget			Additional cost of Longevity Bonus Program under CSSB 347 by funding source			Reconciliation: Total cost of Program		
	Total (All G.F.)*	Adjustment**	Revised Total	G.F.	P.F.°	Total	G.F.	P.F.	Total
100 Personal Services	175.6		175.6	49.9		49.9	225.5		225.5
200 Travel	4.0		4.0				4.0		4.0
300 Contractual	85.6		85.6	56.9		56.9	142.5		142.5
400 Supplies	3.5		3.5	1.5		1.5	5.0		5.0
500 Equipment	.7		.7				.7		.7
700 Grants	32,551.5	(1,507.5)	31,044.0	(30,935.7)°	3,756.0	3,756.0		34,800.0	34,800.0
Totals	32,820.9	(1,507.5)	31,313.4	108.3	3,756.0	3,864.3	377.7	34,800.0	35,177.7

* G.F. = General Fund.

**Based on revised estimate of 10,348 recipients in FY 85.

° P.F. = Permanent Fund.

°°\$30,935.7 is a reduction in expenditures from the General Fund and is not carried into the totals of this column (for information only).

***The cost of Longevity Bonus Program should CSSB 347 become law (FY 85 only) based on payments of \$200 per month.

CSSB 347
Fiscal Note Analysis
Prepared By Division of Pioneers' Benefits
Department of Administration
February 27, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

This fiscal note was requested to be prepared using the following assumptions:

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications.

There will be approximately 10,348 persons on the Longevity Bonus program by July 1, 1984. Therefore, it is assumed, as requested using the February 22 information, that an additional 4,152 persons will be enrolled on the program in FY 85 under the bill.

- c. The amount of the bonus would be \$200 per month. According to calculations of Permanent Fund Distributable Income issued by the Department of Revenue in January of 1984, \$38.9 million would be available for credit to the Longevity Bonus account in FY 85. At \$200 per month only \$34.8 million would be required, leaving an unspent balance of \$4.1 million in FY 85.
- d. No retroactive payments would be paid.
- e. The program would continue to grow at the rate of approximately 50 per month, after the initial group of persons are enrolled who would be made eligible by the one-year residency requirement.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) would be paid from the General Fund. Bonus payments would be paid from the Longevity Bonus Account established from earnings of the Permanent Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on July 1, 1984.

CSSB 347
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 49,862
Clerk V, PFT	\$28,710
Clerk II, PPT (2 positions, 6 months)	21,152
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	56,950
Commodities	1,500
Office supplies and file cabinets for application and recipient files	
Grants	9,964,800
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 12 x \$200	
Difference in cost per month for those already enrolled on July 1, 1984 (\$50 x 12 x 10,348)	(6,208,800)
Total additional funds required for FY 85	\$ 3,864,312

February 27, 1984

Total Longevity Bonus Program Costs (Actual)

(CSSB 347)

FY 85	Administration (reg.)	\$ 269,400	GF
	Additional Administration	108,312	GF
	Grants (14,500 x 12 x \$200)	34,800,000	PF
	Total	<u>\$35,177,712</u>	
FY 86	Administration	\$ 269,400	GF
	Additional Administration	87,600	GF
	Grants (15,100 x 12 x \$200)	36,240,000	PF
	Total	<u>\$36,597,000</u>	
FY 87	Administration	\$ 269,400	GF
	Additional Administration	88,600	GF
	Grants (15,700 x 12 x \$200)	37,680,000	PF
	Total	<u>\$38,038,000</u>	
FY 88	Administration	\$ 269,400	GF
	Additional Administration	89,600	GF
	Grants (16,300 x 12 x \$200)	39,120,000	PF
	Total	<u>\$39,479,000</u>	
FY 89	Administration	\$ 269,400	GF
	Additional Administration	90,600	GF
	Grants (16,900 x 12 x \$200)	40,560,000	PF
	Total	<u>\$40,920,000</u>	

CSSB 347 (Judiciary) Sectional Analysis

SECTION 1

Establishes the Longevity Bonus Account as a separate account within the Alaska Permanent Fund and also takes 12.5 percent of the income of the Permanent Fund earned during a fiscal year that is available for distribution and transfers it to the Longevity Bonus Account. Section 1 also states that the money shall be reinvested, and the Legislature may annually appropriate money in the Longevity Bonus Account to the Alaska Longevity Bonus Fund to pay monthly longevity bonuses.

SECTION 2

Changes percentage of Permanent Fund Earnings distributed to 37.5 percent (to coincide with Section 1).

SECTION 3

Establishes a 1 year residency and over 65 years of age as the qualifications for the Longevity Bonus.

SECTION 4

Establishes a \$200 a month payment plus a 3 percent annual increase, unless the amount available is too small, then the amount available is divided by the number of applicants.

SECTION 5

Deletes the words "He" and "His", and adds the words "the recipient".

SECTION 6

Changes the language so that the Alaska Longevity Bonus Fund can receive funds from the Alaska Permanent Fund.

SECTION 7

Allows the Commissioner of Administration to have access to state records (other than personal income tax returns) if those records relate to the length of residency of a Longevity Bonus applicant. The information received is to be kept confidential.

SECTION 8

Definition of resident

SECTION 9

Findings and purpose

SECTION 10

Repeals definition of bonus and domicile in Alaska statutes

SECTION 11

Retroactive clause for bonuses-July 1, 1983

Section 12

Effective date clause-30 days after the ruling by the Alaska Supreme Court in the affirmative of the Vest vs. the State of Alaska.



ALASKA STATE LEGISLATURE
HOUSE OF REPRESENTATIVES
RESEARCH AGENCY

Pouch Y, State Capitol
Juneau, Alaska 99811
(907) 465-3991

August 31, 1983

MEMORANDUM

TO: Representative Hugh Malone

FROM: Gretchen Keiser *G. Keiser*
Legislative Analyst

RE: Basic Information on Alaska's Elderly Population
Research Request 83-203

Cliff Groh, on your behalf, requested that we answer a number of questions regarding Alaska's aged population. The information requested can be subdivided into the following four topics:

- I. Alaska's Elderly Population: Present and Future
- II. Elderly Public Assistance and Social Security Recipients
- III. Longevity Bonus Program Recipients
- IV. Life Expectancies of Alaska's Elderly

This memorandum presents the information we obtained regarding older Alaskans. We initially provide a summary of findings then present detailed information on each of the above topics in four separate sections. Specific questions you asked are reiterated at the beginning of each section.

SUMMARY OF FINDINGS

The number of older persons residing in Alaska cannot be definitely estimated because of the inherent biases and limitations of the population data available from two key sources: the Alaska Department of Labor and the Permanent Fund Dividend Program. We conclude that the elderly population (65 years and older) as of July 1, 1983 probably falls between approximately 14,500 and 15,900. Estimates in this range are higher than the 13,500 population figure used by Senate supporters of the proposed modification to the Longevity Bonus Program under CS5B 215 but lower than the 16,500 figure used by the Department of Administration in its preparation of fiscal notes for a modified Longevity Bonus Program earlier this year (pages 4 - 8).

Representative Malone
August 31, 1983
Page 2

On the basis of rather limited data, we suggest that approximately 96 to 98 percent of older Alaskans have resided in the state more than one year. The available data indicate that in recent years at least 2 to 4 percent of the elderly, on an annual basis, are new entrants with less than one year of residency. Therefore, assuming that 2 percent migrated to the state within the last year, we estimate that between 14,315 and 15,580 older Alaskans are residents of at least one year. If we assume a greater in-migration of 4 percent annually, between 14,020 and 15,265 elderly would be eligible for a longevity bonus under a one-year residency requirement (pages 5 and 6).

During the period 1970 - 1982, the elderly population growth rate (5.6 percent average annual growth) was considerably greater than that of the total population in Alaska (3.4 percent), mirroring a nationwide pattern. In 1982, the elderly represented approximately 3 percent of Alaska's population. The elderly population is expected to continue growing between 4 and 6 percent annually, while the total population growth rate is projected to slow to between 1 and 2 percent annually through the remainder of this century (pages 9 and 10).

We projected Alaska's elderly population in the year 2000 under a series of average annual growth rates. If we assume a 1983 population of 15,250 (midpoint of the 14,600 to 15,900 range previously discussed), the elderly population in the year 2000 would equal 30,100 (at 4.0 percent average annual growth), 32,170 (4.5 percent), 35,680 (5.0 percent), 38,845 (5.5 percent), and 42,290 (6.0 percent) in the year 2000. By the turn of the century, Alaska's elderly population will probably be between 2 to 3 times its present size. At 5 percent growth per year, the elderly would represent approximately 6 percent of the state's population in the year 2000, as projected by ISER's MAP model base case forecast (pages 10 - 13).

Available information on elderly interstate migration, historical patterns of older Alaskans' migration, socioeconomic characteristics, and lifestyle preferences of aged persons suggest that a dramatic increase in Alaska's elderly population solely on the basis of a monthly cash payment program is unlikely. Out-migration of Alaska's elderly may well be reduced somewhat. The aged most likely to migrate to the state as a result of a cash payment program would be those with relatives already in the state (pages 13 - 16).

The major sources of cash benefits to elderly public assistance recipients are federally funded Supplemental Security Income (SSI) and State-funded Old Age Assistance (OAA), which average \$238 per month for 900 SSI recipients and \$236 per month for 2,300 OAA recipients. Approximately 18 percent of elderly Alaskans were SSI and/or OAA recipients in October 1982. In comparison, approximately 9 percent of the total population receive monthly public assistance of all types (pages 17 - 19).

Representative Malone
August 31, 1983
Page 3

In 1982, 10,210 older Alaskans received Social Security payments under the retirees, survivors, and disability programs. Nationally in 1982, monthly payments averaged: \$408 (retired worker), \$700 (aged couple both receiving payments), and \$378 (aged widow or widower) (page 17).

A total of 9,776 older Alaskans, representing approximately 61 to 67 percent of Alaska's elderly were qualified to receive longevity bonus payments in July 1983. On the average, 95 percent of the qualified recipients received bonus payments each month during FY83, with the remainder being ineligible due to absences of more than 30 days. The number of qualified recipients grew about 7 percent in the last year (pages 19 - 20).

Over two-thirds of the bonus recipients in January 1983 were 65 to 74 years old. Approximately one-quarter of the qualified recipients currently live in Southeast, roughly 42 percent live in the Anchorage/Southcentral area, 18 percent in the Interior, and the remaining 15 percent reside in Northern and Western Alaska. Ethnic data are not currently required of bonus applicants, but a 1976 survey indicates that 56 percent of the recipients were Native and 44 percent were non-Native at that time (pages 20 - 22).

Income data are also not required of current bonus recipients. In 1976, an overwhelming majority of recipients surveyed had monthly incomes (including their spouse's) under \$1,000. A 1981 survey reported a marked regional difference in the dependency of older Alaskans (60 years and older) on the bonus payments as the major source of income. Only 3 percent of those surveyed in Southeast and Southcentral indicated that the bonus payments were their major source of income, while 41 and 66 percent of those surveyed in Southwest and Northwest Alaska indicated a primary dependency on the longevity bonus payments (page 22).

Rough estimates from the Department of Health and Social Services suggest that 50 to 70 percent of the aged currently receiving public assistance also participate in the longevity bonus program. Information from the 1976 survey indicates that 77 percent of the recipients of Old Age Assistance also received bonus payments, whereas about 28 percent of the bonus recipients also received OAA (page 23).

The life expectancies of older Alaskans are similar to those of the elderly nationwide. A 65-year old female Alaskan who qualified for the longevity bonus program might expect, on the average, to receive monthly payments for about 22 years, a qualified 65-year old male could enjoy cash payments for roughly 14 years (pages 23 and 24).

I. Alaska's Elderly Population: Present and Future

Questions: How many persons 65 or over are there in Alaska? How many have resided in the state one year or more? How fast is the elderly population growing relative to the entire state population? What are the most likely projections for the number of aged in Alaska in the next 20 years (with and without a reasonable adjustment for the effects of a program which makes cash payments to all elderly one-year residents)?

According to the Alaska Department of Labor (DOL), there were 13,921 Alaskans 65 years and older on July 1, 1982. This estimate is benchmarked to the 1980 Census, revised upward by DOL for estimated undercounting, and adjusted seasonally to a July 1st rather than April 1st date. Persons by age and sex were as follows:

<u>AGE</u>	<u>MALE</u>	<u>FEMALE</u>	<u>TOTAL</u>
65 - 69 years	3,113	3,197	6,310
70 - 74 years	1,818	2,003	3,821
75 years and over	1,652	2,138	3,790
TOTAL	6,583 (47.3%)	7,338 (52.7%)	13,921

In the absence of a DOL population estimate for July 1, 1983, we projected the number of senior citizens based on a review of the annual DOL population data for the period 1970 to 1982 (Attachment A). The older age group grew at an average annual rate of about 5.6 percent over the 12-year period. Looking at the past five years since completion of the TransAlaska Pipeline (1977-1982), the elderly population increased 4.8 percent annually, on the average. More recently between 1980 and 1982, the aged population grew on an average of 6.8 percent annually. On the basis of these recent historical growth rates, we projected the July 1, 1983 elderly population to be: 14,605 (4.8 percent annual growth), 14,725 (5.6 percent), or 14,900 (6.8 percent). We caution you that these are only rough projections based solely on recent annual growth rates.

The 1982 Permanent Fund Dividend (PFD) program provides another source of aged population figures which have been used by the Department of Administration in its review of the Senate's proposed legislative changes to the Alaska Longevity Bonus Program (CSSB 215). In May 1983, the Department of Revenue estimated that at least 16,500 applicants born in 1918 or earlier would ultimately be paid a PFD¹. It

¹ A July 22, 1983 status report on 1982 PFD applicants born in 1918 or earlier does not dramatically change the earlier May estimate from the Department of Revenue.

Representative Malone
August 31, 1983
Page 5

is crucial to note that approximately 1,700 of these applicants were born in 1918 and were therefore 64 years old in 1982. Consequently, the successful PFD applicants 65 years and older in 1982 numbered approximately 14,800. This understates the total elderly population in 1982, however, because in-migrants after April 15, 1982 did not qualify for a PFD. We address this issue later in this section of the report.

In order to employ the successful 1982 PFD applicant total as a basis for estimating the 1983 elderly population, one must account for deaths among aged Alaskans. In 1981, 572 deaths were recorded among Alaskans 65 years and older, representing a death rate of 4.4 percent per year². In addition, 29 deaths occurred among 64-year olds (1.7 percent annually). Therefore, of the 16,500 1982 PFD applicants, approximately 15,900 are now 65 years and older and still alive today. This is, at best, a rough estimate of the 1983 elderly population because it does not account for the out-migration of aged Alaskans since at least October 1982 (8 months) and the in-migration of elderly since April 1982 (14 months).

Usable information regarding the 1982-1983 migration patterns of older Alaskans simply does not exist. Historical trends between 1970 and 1980 and earlier indicate, however, that older age groups in Alaska undergo a net out-migration. In other words, more older persons left the state than migrated to the state during a given period of time. The pattern of elderly net out-migration, although lessening somewhat as the state matures and better services become more commonplace, will probably continue³. It appears reasonable to assume that more aged persons left Alaska than moved into the state between 1982 and 1983. Therefore, we suggest that the 15,900 PFD estimate be viewed as the high estimate of the total elderly population in 1983.

Residency

The overwhelming majority of older Alaskans have been residents for a considerable length of time. A statewide survey of 467 Alaskans 60 years and over conducted by the University of Alaska in 1981 indicates that approximately 90 percent had resided in Alaska for 11 years or

²Alaska Vital Statistics, Annual Report 1981, Department of Health and Social Services, 1982.

³Mr. Dave Swanson, State Demographer, Alaska Department of Labor, Personal Communication, July 16, 1983.

more⁴. Similarly, about 90 percent of the 1979 PFD applicants (65 years and older) reported being residents for at least 11 years, with 75 percent indicating they had been residents for at least 21 years⁵. In a survey conducted by the U.S. Bureau of the Census in 1976, the average residency among civilian Alaskans 65 years and over was 33 years for non-Natives and 71 years for Natives.

Available information indicates that a small percentage of older Alaskans are recent in-migrants. Only 1.5 percent of the respondents to the 1981 University of Alaska survey (60 years and older) had lived in the State less than one year. This is probably a somewhat low estimate because elderly whites, who tend to be the more mobile persons among elderly Alaskans, were underrepresented in the University survey. The PFD program provides additional data on recent migration of older persons. Approximately 1 percent of the 1979 PFD applicants and over 3 percent of the 1980 PFD applicants 65 years and older were Alaska residents for less than one year. These estimates could also be conservative because some recent in-migrants in 1979 and 1980 might not have known of the program or have chosen not to file because they would receive only a fraction of the \$50 per year dividend. Residency data from the 1982 PFD applications useful for determining recent in-migrant estimates of the elderly population are not available at this time. Furthermore, the 1980 Census data, once it becomes available, will only address 5-year interstate migration during the period 1976-1980.

On the basis of rather limited data, we suggest that at least 2 to 4 percent of the older Alaskan population in any given year are recent in-migrants with less than one year of residency. Conversely, 96 to 98 percent of the elderly appear to be longer term residents of Alaska.

Table 1 summarizes the total elderly population figures for 1982 and 1983 which we have discussed above. At this time, we conclude that the number of older persons residing in Alaska cannot be definitively estimated. Given the inherent biases and limitations of the available data, we prefer to identify the aged population as a range, encompassing what we believe to be reasonable low and high numbers. The 1983 total elderly population probably falls between 14,605 and 15,900. Assuming that 2 percent migrated to the state within the last year, we estimate that between 14,315 and 15,580 older Alaskans are residents of at least one year. Alternatively, if we assume a greater annual in-migration of elderly at 4 percent, between 14,020 and 15,265 elderly

⁴ An Assessment of the Status and Needs of Alaska's Elderly, Charles Hines, Department of Sociology, University of Alaska, 1981.

⁵ 1979 Permanent Fund Dividend Applicant Profile, Alaska Department of Revenue, 1981, Table 18.

would currently be eligible for longevity bonus payments under a one-year residency requirement.

The following factors may account for the differences between the high and low population estimates shown in Table 1:

- 1) Unlike the PFD program estimate, the Department of Labor 1982 estimate is benchmarked to the 1980 U.S. Census. Although Census numbers were revised upward by DOL, any residual undercounting would consistently lower annual estimates in later years, such as 1982. Similarly, the House Research Agency 1983 projections would incorporate the same undercounting biases.
- 2) For the purposes of the U.S. Census, individuals who live in Alaska only part of the year may have chosen to identify themselves as residents of another state. This could contribute to a lower Census count of older Alaskans, some of whom may spend a portion of the year elsewhere. On the other hand, the \$1,000 cash payment of the 1982 PFD program provided a great incentive to individuals to identify themselves as Alaska residents. People had a much greater incentive to be "counted" in the 1982 PFD population than during the 1980 Census.

The population estimates in Table 1 fall between the estimates used earlier this year as the basis for proposed changes to the Alaska Longevity Bonus Program. The Senate's estimate of 13,500 eligible persons in FY 84 under CSSB 215 ranges from 4 to 15 percent lower than our estimates, depending upon the growth rate and in-migration assumptions one uses for the elderly. The Senate used a 1983 elderly population forecast made by DOL in 1981 which has been superceded by a higher DOL 1982 estimate. Estimates are more accurate than forecasts because they are based on more adequate population information. In addition, it appears that the Senate figure incorporates a relatively low estimation of annual in-migration by elderly (about 1.3 percent).

On the other hand, the Department of Revenue estimate of 16,500 1982 PFD successful applicants has been used by the Department of Administration as its estimate of eligible recipients for CSSB 215 fiscal calculations. This estimate overstates those eligible in 1983 because it fails to take into account approximately 600 deaths which probably occurred among elderly applicants since the October 15, 1982 deadline. In addition, available data suggest that out-migration among elderly probably offsets in-migration during the 1982-1983 period since filing of the 1982 PFD applications.

Representative Malone
August 31, 1983
Page 7

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TABLE 1. ESTIMATES OF THE ELDERLY POPULATION OF ALASKA IN 1982 AND 1983

Year	Alaska Dept. of Labor ^a	Permanent Fund Dividend Program ^b	House Research Agency ^c
<u>Total Elderly Population</u>			
1982	13,920	14,800 ^d	--
1983	NA	15,900	14,605 (4.8 % growth) 14,725 (5.6 % ") 14,900 (6.8 % ")
<u>Elderly Population With At Least One-Year Residency</u>			
<u>Assumption: 2 percent annual in-migrants</u>			
1982	13,645	14,650 ^e	--
1983	NA	15,580	14,315 (4.8 % growth) 14,430 (5.6 % ") 14,600 (6.8 % ")
<u>Assumption: 4 percent annual in-migrants</u>			
1982	13,365	14,500 ^e	--
1983	NA	15,265	14,020 (4.8 % growth) 14,135 (5.6 % ") 14,305 (6.8 % ")

^a Alaska Population Overview 1982. Alaska Department of Labor, 1983.

^b Source: Alaska Department of Revenue, Research Section.

^c The projections are based on a series of average annual growth rates computed from the Department of Labor's annual population data from 1970 - 1982. The average rates correspond with the following periods: 1977 - 1982 (5 percent), 1970-1982 (6 percent), and 1980-1982 (7 percent).

^d This figure represents the estimated number of successful 1982 applicants who were 6-month residents as of October 15, 1982.

^e These estimates assume that one-half of the annual in-migrants have been captured by the dividend program under the 6-month residency requirement.

Alaska's Elderly Population Growth Rate

In 1982, Alaskans 65 years and older represented 3.0 percent of the state's total population, an increase from 2.3 percent in 1970. There are relatively few older persons in Alaska compared with the elderly nationwide (11.3 percent of the U.S. population in 1980). While Alaska's total population increased by roughly 50 percent during the period 1970 - 1982, the elderly ranks almost doubled. The state's population grew at an average annual rate of 3.4 percent, whereas the elderly segment increased an average of 6.0 percent each year. Furthermore, the growth rate of Alaska's elderly population between 1970 and 1980 was more than double the nationwide rate for the elderly.

A number of factors probably contributed to the rather dramatic increase in Alaska's aged population over the past 12 years:

- 1) A relatively large group of persons 55 - 64 years old has aged over the past decade, swelling the elderly ranks. Many of these people probably migrated to Alaska in earlier decades when they were in their 20's, 30's and 40's.
- 2) Death rates among middle-aged and older Alaskans have decreased due, in part, to improved health services in the state.
- 3) The historical out-migration of older Alaskans, particularly whites, has decreased as the state matures and greater social and health care amenities become available in-state.
- 4) The in-migration of older persons may have increased during the period. Not surprisingly, the major motivating factor for interstate migration of persons 55 years and older nationwide is to be closer to relatives⁶. Common sense suggests that the most likely reason for an aged couple or individual to move north to Alaska would be in order to live near or with their children or siblings.

The elderly population in Alaska is expected to sustain its healthy growth rate of the past decade into the future. Projections vary between approximately 4 and 6 percent annual growth through the remainder of this century⁷. On the other hand, growth projections for Alaska's total population to the year 2000 suggest annual growth rates between 1 and 2 percent, much lower than the average of over 3 percent

⁶ Reasons for Interstate Migration. U.S. Department of Commerce, Bureau of the Census, Special Studies Series P-23, No. 81, March 1979.

⁷ Mr. Dave Swanson, State Demographer, Alaska Department of Labor, Personal Communication, July 26, 1983 and Dr. Scott Goldsmith, Economist, Institute of Social and Economic Research, University of Alaska, Personal Communication, July 16, 1983.

during the period 1970 to 1982⁸. In light of the above projections, it is apparent that Alaska's elderly will probably represent at least 5 percent of the state's population by the year 2000. For instance, if annual growth rates of 5.0 percent (elderly population) and 1.5 percent (total population) are assumed, the elderly would represent 5.7 percent of Alaska's population in the year 2000, based on DOL's 1982 population estimates. The anticipated increase in Alaska's aged as a percentage of the total population mirrors national projections in which the elderly will increase to over 13 percent of the nation's population at the turn of the century.

Alaska's Elderly Population in the Future

Generating long-range population projections requires considerable understanding of Alaska's demographic and economic conditions which influence population levels. Underlying assumptions are crucial and often lead to quite different projections. Below we analyze some long-range projections of Alaska's population.

1. The U.S. Bureau of the Census presents a series of projections based on three patterns of age-specific migration: actual 1965-1975 migration, actual 1970-1975 migration, and hypothetical zero net migration⁹. The projections are based on Census data up to 1975; the 1980 Census data are not included¹⁰. The migration pattern of the elderly during the period 1965-1975 generates low growth in the elderly population, elderly migration during 1970-1975 produces moderate growth, and the zero net migration scenario shows high growth in the elderly

⁸ Mr. Tom Chester, Division of Strategic Planning, Office of Budget and Management, Personal Communication, August 3, 1983, and Man-in-the-Arctic Program Economic Modelling System Technical Documentation Report, Inst. for Social and Economic Research, University of Alaska, June 1983.

⁹ Hypothetical zero net migration implies that the number of persons who left the state equaled the number who moved to the state in a given period of time, resulting in zero change due to migration.

¹⁰ Illustrative Projections of State Populations by Age, Race and Sex: 1975 to 2000, U.S. Bureau of the Census, Current Population Reports, Series p-25, No. 796, March 1979.

population. The U.S. Bureau of the Census projections for the year 2000 are as follows:

<u>Elderly Growth Scenario</u>	<u>65 and Older Population</u>	<u>Elderly as a % of Total</u>	<u>Total Population</u>
Low ('65-'75 migration)	20,500	4.3 %	474,200
Moderate ('70 - '75 migration)	25,300	4.7 %	544,086
High (zero net migration)	40,500	7.6 %	534,300

We consider the elderly population projections under the low and moderate growth scenarios to be low given the tendency for Census data to be conservative and the fact that elderly migration patterns in the late 1960s and early 1970s probably overstate current out-migration. On the other hand, the projection of 40,500 elderly in the year 2000 (high growth scenario) may be high; out-migration will probably continue to exceed in-migration among older Alaskans.

2. The Department of Revenue developed projections of Alaska's population primarily to estimate the future number of Permanent Fund Dividend recipients over the short term (to FY85)¹¹. Revenue's projections are based on the actual growth in the number of adult PFD applicants between 1978 and 1979 (4.5 percent growth) and general assumptions regarding the juvenile population under 18 at the time. The total population was projected to be approximately 832,000 in the year 2000, implying an average growth rate of about 3.1 percent annually. As mentioned earlier, the future growth in Alaska is projected to be much lower, between 1 and 2 percent per year until the turn of the century. Given the intended short-range purposes and the limited nature of the data base, we recommend that Revenue's population projections not be used for the purpose of estimating the number of Alaskans eligible for the Longevity Bonus Program.

Revenue's population projection has formed the basis of the elderly population figures under CSSB 215. The 832,000 population figure for the year 2000 was used and three growth scenarios were developed to forecast the number of elderly in the population at that time¹².

¹¹ Ms. Mary Ellen Frank, Research Section, Alaska Department of Revenue Personal Communication, August 1, 1983.

¹² Mr. Bob Richardson, Actuary, Wm. Mercer, Inc. Personal Communication, July 29, 1983.

The following elderly population projections were generated for the year 2000:

<u>Elderly Growth Scenario</u>	<u>Elderly as a % of Total</u>	<u>65 and Older Population</u>	<u>Total Population</u>
Low	3.10 %	25,791	832,000
Moderate	4.55	37,854	832,000
High	6.00	49,918	832,000

Under the inflated total population projection, the Senate supporters of CSSB 215 chose to adopt the low growth scenario elderly population of 25,791 in the year 2000. In order for this projection to be accurate, the elderly growth rate would have to decline to about 3.4 percent annually from a current annual growth of approximately 6 percent and the total population would have to maintain a 3.1 percent annual growth rate, close to its recent 3.4 percent annual rate of growth. Both of these conditions would run counter to future projected growth. The elderly population, in fact, is projected to grow approximately 3 times faster than Alaska's overall population between now and the year 2000.

3. The Institute of Social and Economic Research (ISER) of the University of Alaska recently published a series of computer simulations forecasting the state's total population to the year 2010¹³. ISER's Man-in-the-Arctic (MAP) model forecasts are based on common underlying assumptions regarding future economic conditions in Alaska and differing assumptions regarding the levels of State petroleum revenues. Population forecasts range between approximately 578,000 and 688,000 in the year 2000. The base case simulation, which assumes a level of revenues consistent with the Department of Revenue's 50 percentile revenue projections for royalties and severance taxes, projects a population of 593,612 in the year 2000 (see Attachment B). This reflects an average annual growth rate of approximately 1.5 percent, which falls within the 1 to 2 percent range previously mentioned as the likely annual growth rate for the state's population until the turn of the century. Unfortunately, the ISER documentation does not provide age-specific population forecasts so there are no elderly population projections.

¹³Man-in-the-Arctic (MAP) Economic Modeling System Technical Documentation Report, Appendix N, ISER, University of Alaska. Prepared for Harza-Ebasco Susitna Joint Venture. June 1983.

In conclusion, we project Alaska's elderly population in the year 2000 under a series of average annual growth rates. Elderly growth rates between 4 and 6 percent per year are assumed, based on conversations with Mr. Dave Swanson, State demographer, and Dr. Scott Goldsmith of ISER. We assume a 1983 elderly population of 15,250, which is the midpoint of the 14,600 - 15,900 range we estimated earlier. Calculations of the elderly as a percentage of the total population are based on ISER's MAP model base case forecast of the total population in the year 2000 as we believe that this is the most reasonable projection of those reviewed.

<u>Average Annual Elderly Growth</u>	<u>65 and Older Population</u>	<u>MAP Model Total Population</u>	<u>Elderly as a % of Total</u>
4.0	30,100	593,612	5.1 %
4.5	32,170	593,612	5.5
5.0	35,680	593,612	6.0
5.5	38,845	593,612	6.5
6.0	42,290	593,612	7.1

It appears that Alaska's elderly population in the year 2000 will probably be 2 to 3 times its present size. With 5 percent annual growth, the midpoint of elderly growth rate projections, older Alaskans will number approximately 35,680 at the turn of the century. Elderly would represent 6 percent of the state's projected population, whereas today they represent only 3 percent of the population.

Elderly Population Increase Under the Longevity Bonus Program

Projecting the aged population in Alaska if a program existed which provided monthly cash payments to all elderly residents of at least one year rests upon an understanding of the migration patterns among elderly persons. While some Census data exist on a national level, relatively little information is available specifically about recent elderly Alaskan emigrants and immigrants. We present a number of factors which should be considered in a discussion of possible population increases due to the influence of a monthly cash payment program.

1) The elderly, as a group, are nonmovers. Census data between March 1975 and March 1980 indicate that less than 1 percent of persons 65 years and over moved across interstate lines into western states¹⁴.

¹⁴Geographical Mobility: March 1975 to March 1980, U.S. Bureau of the Census. Current Population Reports, Series P-20, No. 368, 1981.

Similarly, less than 1 percent of persons, aged 55 - 64 years, moved to or among the western states. In fact, 79 percent of elderly (65 and over) did not move at all during this 5-year period; 75 percent of persons 55 - 64 years old also did not move.

2) Major reasons cited by persons 55 and older for interstate migration in another Census Bureau national study were:¹⁵

To be closer to relatives	22.2 percent
Retirement	19.8 "
Change of climate	12.1 "
Other family reasons	11.2 "
Job transfer	6.0 "
New job or looking for work	4.9 "

3) A national study reports that older migrants tend to be separated or divorced, of low income, less educated, renters, in better health, and have earlier histories of mobility¹⁶

4) Historically, middle-aged and elderly age groups in Alaska have shown a net out-migration. During the period 1965 - 1970, three times as many persons 65 years and older left the state as immigrated¹⁷. Between 1970 and 1980, more whites 45 years and older left the state than entered¹⁸. Nonwhites of the same ages experienced a net in-migration, perhaps reflecting as has been suggested an increased pride of heritage among Alaska Natives and the settlement of the Alaska Native Claims which may have encouraged Natives to return to Alaska .

5) Despite existing incentives to encourage the elderly to remain in Alaska (e.g., Longevity Bonus Program, Property/Sales Tax Exemptions, and Pioneers' Home Program), many have continued to leave after retirement. Many probably seek places with a lower cost of living or a less severe climate. Others may chose to return to an area where they were born and may still have family.

¹⁵Reasons for Interstate Migration. U.S. Bureau of the Census, Special Studies Series P-23, No.8, March 1979.

¹⁶Handbook of the Pyschology of Aging, J.E. Birren and K.W. Schaie, Eds, New York: Van Nostrand Reinhold Co, 1977.

¹⁷Interstate Migration in Alaska, Matthew Berman, ISER, University of Alaska. November 1982. Table 2.

¹⁸The Demand for the Juneau Pioneers' Home, Alaska Economics, Inc., December 1982.

6) As Alaska matures from a "frontier" area to a more established state, the migration patterns may change. The Alaska Department of Labor has developed a series of age-sex specific net migration patterns to be used when forecasting Alaska's future population. In general, the patterns suggest that a smaller net out-migration will occur among older age groups as the state continues to become more established. In other words, as more health services and social amenities become available in-state, more older Alaskans may chose to remain in Alaska after retirement.

7) According to a 1976 survey of Longevity Bonus and Old Age Assistance (OAA) recipients conducted by the Alaska Department of Health and Social Services, the bonus payment positively influenced some of the recipients' plans to remain in the state at that time¹⁹. Of those surveyed who received only the bonus, nearly one-third indicated that the bonus positively affected their decision to remain. About 5 percent of those surveyed who were dual recipients of the bonus and OAA stated that the bonus had a positive effect on their decision to stay. The Longevity Bonus had the greatest effect on those with a higher household income (at least \$1,000 per month) because the bonus provided enough additional money to enable them to maintain their present standard of living without leaving the state.

8) The high cost of living and cost of relocation are considerable disincentives for in-migration of older persons to Alaska, particularly for those who are retired and living on a relatively low fixed income. Substantial costs could be incurred prior to establishing the one-year residency required under a modified longevity bonus program. Table 2 shows the U.S. Bureau of Labor Statistics (BLS) data for Autumn 1981 comparing annual expenditures for a retired couple under three standards of living: low, intermediate, and high budgets. The table shows budgets for Anchorage and a U.S. average.

TABLE 2. ANNUAL BUDGET FOR A RETIRED COUPLE (Autumn 1981)

	<u>LOW</u>	<u>INTERMEDIATE</u>	<u>HIGH</u>
Anchorage	\$9,774	\$12,900	\$18,354
U.S. Average	\$7,226	\$10,226	\$15,078
Difference (% of U.S. average)	\$2,548 (35%)	\$ 2,674 (26%)	\$ 3,276 (22%)

Source: U.S. Department of Labor, Bureau of Labor Statistics.

¹⁹Alaska Longevity Bonus Impact Survey 1976, Alaska Department of Health and Social Services, Division of Public Assistance, 1976.

The annual budgets in Anchorage range from 22 to 35 percent above the U.S. averages, with the percentage difference highest for a low budget couple. BLS data are not available for other Alaska communities, but evidence from in-state cost differentials indicates that the gap between the U.S. averages and most other Alaska communities is even greater.

Census data for 1980 indicates that 36 percent of aged family units have household incomes below \$9,999, which approximates the above BLS data for a retired couple on a low annual budget in Anchorage in 1981. Nearly 50 percent fall below \$12,499, which roughly equals the BLS intermediate budget of \$12,900 in Anchorage. Additional information from the U.S. Department of Labor indicates that a Lower Living Standard for one person in Anchorage was \$8,260 in June 1982. Approximately 74 percent of elderly unrelated individuals reported an income below this figure in the 1980 Census. Therefore, it appears reasonable to assume that the cost of living in Alaska will, to some degree, act as a deterrent to many aged couples and individuals who might otherwise consider moving to Alaska in order to participate in a monthly cash payment program for the elderly.

In conclusion, we believe that the aged most likely to migrate to Alaska as a result of a cash payment program would be those with relatives already in the state. Living with relatives, either siblings or children, would certainly defray some of the initial and longer term costs involved. However, we do not foresee a dramatic influx of aged persons into established Alaska households under the stimulus of a cash payment program. In general, elderly prefer to live in their own households as long as possible and change their living arrangements primarily when their self-care capacity declines. Furthermore, aged persons may prefer to live with siblings or children closer to their familiar surroundings rather than uproot themselves to a, perhaps, quite foreign Alaskan environment.

A cash payment program widely available to elderly with one-year residency may very well reduce out-migration and may somewhat enhance in-migration of aged persons into Alaska. Available information on interstate migration, historical patterns of Alaska migration, socioeconomic characteristics, and living preferences of aged persons suggest, however, that dramatic population increases solely on the basis of a cash payment program are unlikely. A considerable degree of speculation will surround this issue until, at the very least, a survey of recent older Alaskan emigrants and immigrants is conducted. Survey questions specifically addressing the reasons for their recent move would provide valuable information on this issue.

II. ELDERLY PUBLIC ASSISTANCE AND SOCIAL SECURITY RECIPIENTS

Questions: How many persons 65 and over in Alaska receive public assistance or Social Security? On the average, how much in public assistance or Social Security do the elderly receive per person? How does the percentage of elderly receiving public assistance compare with the percentage of the entire population receiving public assistance?

There are a number of public assistance programs available to older Alaskans. Table 3 provides a summary of the different programs, number of elderly recipients, and average benefits. Supplemental Security Income (SSI) and Old Age Assistance (OAA) are the major sources of monthly cash benefits to those receiving public assistance. Approximately 900 receive federally funded SSI and 2,300 receive State-funded OAA. Monthly benefits currently average \$238 (SSI) and \$236 (OAA). While SSI, with its lower income limits, provides a first source of public assistance to the truly needy, 700 aged SSI recipients also receive OAA benefits.

According to the Department of Health and Social Services, approximately two-thirds of the OAA recipients in October 1982 were rural residents and one-third lived in Anchorage, Fairbanks or Juneau. Approximately 64 percent of the OAA recipients were Native, 28 percent White, 2 percent Black, and 6 percent other or unknown.

In 1982, 10,210 Alaskans 65 years and older received Social Security payments under the retirees, survivors, and disability programs. Although current information regarding average benefits received by Alaskans is not available, monthly payments nationally in 1982 averaged: \$408 (retired worker), \$700 (aged couple both receiving payments), and \$378 (aged widow or widower)²⁰.

The percentage of older Alaskans receiving public assistance cannot be determined exactly as the degree of overlap among aged recipients on all forms of public assistance is not readily identifiable. One approximate estimate is that the 2,500 recipients of SSI and/or OAA represent 18 percent of the 13,921 population estimate of the Department of Labor in 1982. In comparison, approximately 40,000 Alaskans (9 percent of Labor's 1982 total population estimate) receive monthly

²⁰Ms. Norma Eubanks, Service Rep, Social Security Administration, Juneau, Personal Communication, August 8, 1983.

TABLE 3. A SUMMARY OF PUBLIC ASSISTANCE PROGRAMS FOR ELDERLY RECIPIENTS IN ALASKA

Program Name	Program Description	Type of Benefit	Income Limit (Number of Persons)				Number of Elderly Alaskans	Average Benefit
			1	2	3	4		
Old Age Assistance	State payments to needy	monthly cash	\$546	802	n/a	n/a	approx. 2,300	\$236.70/mo.
Food Stamp	Federal funds designed to promote health & nutrition among low income homes	food coupons	\$490	650	810	970 (net monthly income)	1,700	\$32/person (random sample of 10 elderly cases.)
Supplemental Security Income	federal funds to aged or disabled needy	Monthly cash	\$304	436	n/a	n/a	approx. 900	\$238/mo.
Energy Assistance	Federal block grant monies to low income households	Vendor home energy credit	\$851	1113	1375	1637 (net monthly income)	approx. 1,400	\$475
General Relief Medical	State funds for medical assistance, primarily drugs for Medicaid eligible elderly	Vendor payment	\$300	400	n/a	n/a (or same as SSI or OAA)	2,750 eligibles, approx. 30% use benefits	\$50/mo.
Medicaid-Nursing Home ¹	Cost of care payments for needy in nursing home 52% - state 48% - federal	Vendor payment	\$852.9	n/a	n/a	n/a	approx. 300	\$3,600/mo
Medicaid-Regular	Medical care payments for OAA recipients 52% - federal 48% - state	Vendor payment	\$546	802	n/a	n/a	approx. 2,300 eligible, approx. 940 use benefits each month	\$1,027/usage

¹ Excludes Alaska Psychiatric Institute and Harborview Developmental Center.

Source: Alaska Department of Health and Social Service, Division of Public Assistance. July 1983.

public assistance of all types²¹. The percentage of elderly Alaskans receiving OAA has declined since 1960 when 28.5 percent were recipients²². Nevertheless, the percentage of older Alaskans receiving public assistance is higher than the 10 percent aged nationwide who received public assistance in 1980²³.

III. LONGEVITY BONUS PROGRAM RECIPIENTS

Questions: What is the income distribution, ethnic composition, and geographic distribution of bonus recipients? What percentage are below the poverty line? What percentage of bonus recipients are receiving public assistance, and vice versa?

A total of 9,776 older Alaskans were qualified for longevity bonus payments in July 1983, with 96 percent actually receiving payments. As shown in Table 4, approximately 95 percent of the qualified recipients, on the average, received bonus payments each month in FY83. The percentage who receive payments varies seasonally, with the percentage dropping during the winter and early spring months--when some elderly spend time in warmer places--and peaking in the summer and fall.

The number of qualified recipients of the longevity bonus program grew about 7 percent in the past year. As Table 4 shows, the program witnessed an average net growth of 50 recipients per month last year. On the basis of reasonable 1983 population estimates considered in Section one of this report, somewhere between 61 percent (15,900 estimate) and 67 percent (14,605 estimate) of the aged Alaskans currently are qualified for bonus payments.

²¹Mr. Gordon Landes, Division of Public Assistance, Alaska Department of Health and Social Services, Personal Communication, August 8, 1983.

²²Old Age Assistance Study, Alaska Department of Health and Social Services, May 1966.

²³"Relative Importance of Various Income Sources of the Aged, 1980", Melinda Upp, Social Security Bulletin 36(1), January 1983.

TABLE 4. LONGEVITY BONUS RECIPIENTS: JULY 1982 - JULY 1983

<u>Month/Year</u>	<u>Qualified Recipients</u>	<u>Net Monthly Growth</u>	<u>Number Receiving Bonus</u>	<u>Percent of Total</u>
7/82	9124	--	8930	97.9 %
8/82	9191	67 persons	8960	97.5
9/82	9247	56	9006	97.4
10/82	9317	70	9020	96.8
11/82	9372	55	8987	95.9
12/82	9425	53	8896	94.4
1/83	9481	56	8843	93.3
2/83	9486	5	8741	92.2
3/83	9528	42	8750	91.8
4/83	9577	49	8895	92.9
5/83	9659	82	9144	94.7
6/83	9731	72	9352	96.1
7/83	9776	45	9426	96.4

Average Net
 Monthly Growth: 50 persons

FY83 Average: 95.1 %

Source: Longevity Bonus Program, Alaska Department of Administration

Unfortunately, current information about bonus recipients is rather limited. Applicants are required to provide their age and a mailing address; no data on income or race are collected. Table 5 presents an age distribution of bonus recipients in January 1983. Recipients range between 65 and 116 years old, with over two-thirds aged 65 - 74.

The geographic distribution of program recipients in June 1983 is summarized in Table 6. Approximately one-quarter of the qualified recipients live in Southeast, roughly 42 percent live in the Anchorage/Southcentral region, 18 percent in the Interior, and the remaining 15 percent reside in Northern and Western Alaska.

TABLE 5. AGE DISTRIBUTION OF LONGEVITY BONUS PROGRAM RECIPIENTS
(January 7, 1983)

<u>Years</u>	<u>Number of Recipients</u>	<u>Percent of Total</u>
65-69	3,606	40.1 %
70-74	2,570	28.6
75-79	1,597	17.7
80-84	786	8.7
85-89	293	3.3
90-94	111	1.2
95 and older	37	0.4

Source: Longevity Bonus Program, Alaska Department of Administration

TABLE 6. GEOGRAPHIC DISTRIBUTION OF LONGEVITY BONUS RECIPIENTS
(June 28, 1983)

<u>Region</u>	<u>House Districts</u>	<u>Number of Qualified Recipients</u>	<u>Percent of Total</u>
Southeast	1-4	2,395	24.5 %
Southcentral/ East Peninsula	5,6,16,27	1,559	15.9 %
Anchorage vicinity	7-15	2,540	26.0 %
Interior	11-21,24	1,781	18.2 %
Northern	22	380	3.9 %
Western	23,25,26	<u>1,121</u>	<u>11.5 %</u>
TOTAL		9,776	100.0 %

Source: Longevity Bonus Program, Alaska Department of Administration

Detailed summaries of longevity bonus program recipients by age and House District are presented in Attachment C.

The previously mentioned 1976 survey of recipients of the Longevity Bonus (LB) and Old Age Assistance (OAA) provides the only available information about the racial composition and income of bonus recipients²⁴. The survey targeted three groups of recipients: OAA-only, dual OAA/LB, and LB-only. At that time, 56 percent of all bonus recipients surveyed were Native and 44 percent were non-Native. Nearly 76 percent of the dual OAA/LB recipients surveyed had incomes (including their spouse's) below \$420 per month²⁵. In addition, the overwhelming majority (83 percent) of the LB-only recipients surveyed had monthly incomes (including their spouse's) under \$1,000. It appears that, at least in 1976, the incomes of the majority of bonus recipients were certainly not high.

An additional survey of bonus recipients conducted by the Department of Law in 1982 cannot be considered representative of all the program's recipients because the survey specifically targeted needy recipients. Furthermore, preliminary results of the survey with regard to income are confusing because some respondents included their spouse's income while others did not.

We were unable to accurately determine the percentage of current bonus recipients who are below the poverty line because of the lack of income data for program participants. The Census data provide a frame of reference, indicating that 13 percent of older Alaskans lived below the federal poverty level in 1980. However, there were considerable regional differences in elderly income within Alaska. Less than 11 percent of Alaskans (60 years and older) in Southeast, Interior and Anchorage lived below the poverty level, whereas approximately 28 and 34 percent had incomes below the poverty level in Northwest and Southwest Alaska, respectively²⁶. In comparison, about 15 percent of the elderly nationally had incomes below the poverty level in 1980. One is cautioned, however, about making definite statements with respect to income as an absolute measure of poverty status in Alaska because of the reliance on a subsistence (non-cash) economy, to a considerable degree, in rural Alaska.

The previously mentioned 1981 University of Alaska survey of Alaskans 60 years and over provides a measure of the degree of importance the longevity bonus holds as an income source for the elderly. This survey

²⁴Alaska Longevity Bonus Impact Survey, Alaska Department of Health and Social Services, 1976

²⁵The income limit for an aged couple receiving Old Age Assistance in 1975 was \$420 per month.

²⁶A New Beginning for Older Alaskans: A Comprehensive Statewide Plan and Management Information System, Segment One, Hall & Associates, Inc., 1982.

reports a marked regional difference in the dependency of older persons on the bonus payments as their major source of income. Three percent of those surveyed in Southeast and Southcentral relied on the bonus payment as their major income source. On the other hand, 41 and 66 percent of the persons surveyed in Southwest and Northwest respectively indicated a primary dependency on the monthly bonus payments. These percentages should be viewed as only rough approximations because the survey included individuals aged 60 to 64 years who are more likely to still be employed. Also, the survey sample overrepresented women and Natives; elders of these groups characteristically have lower incomes than either men or Whites.

Rough estimates by the Department of Health and Social Services suggest that between 50 and 70 percent of the aged currently receiving public assistance also receive longevity bonus payments²⁷. Longevity bonus information is not consistently collected on Old Age Assistance applications because the bonus is not considered income for the purposes of OAA eligibility. Information from the 1976 longevity bonus impact survey indicates that about 77 percent of the OAA recipients received bonus payments at that time. Conversely, about 28 percent of the bonus recipients received OAA payments in 1976. The Longevity Bonus Program within the Department of Administration is not able to provide this sort of information about dual recipients because income data are not requested of applicants.

IV. LIFE EXPECTANCIES OF OLDER ALASKANS

Question: What are the life expectancies of Alaska's elderly?

Life expectancy data for older persons in Alaska are presented in Table 7. The life expectancies of older Alaskans are generally similar to those of the elderly nationwide. Aged females enjoy a longer life expectancy than aged males in Alaska and nationally. This difference in death rates between the sexes is expected to continue although it probably will not increase in the future.

Table 7 indicates that elderly Alaska males appear to have a lower life expectancy in all five-year age groups in 1980 when compared with 1970 data. The lower life expectancies shown for 1980 may, in part, be a result of larger numbers of elderly males remaining in Alaska or partially an artifact of the small population numbers. At this time,

²⁷Mr. Gordon Landes, Division of Public Assistance, Alaska Department of Health and Social Service, Personal Communication, July 8, 1983.

we do not believe that there is a significant trend toward lower life expectancy peculiar to older Alaska males.

TABLE 7. LIFE EXPECTANCY in YEARS of OLDER ALASKANS by AGE and SEX

Age	1970			1980		
	Total	Male	Female	Total	Male	Female
55-59	23.27	20.73	27.37	23.97	20.58	29.70
60-64	19.53	17.23	23.48	20.14	16.82	25.72
65-69	16.53	14.51	19.98	16.17	13.66	21.79
70-74	14.20	12.48	17.06	14.14	11.16	19.02
75 and over	11.49	10.13	13.77	11.35	8.41	16.08

Source: Alaska Population Overview 1982. Alaska Department of Labor, 1983.

Based on the life expectancy data for 1980 and the method of calculating life expectancies in five-year cycles, we estimated the approximate number of years that qualified individuals of certain ages might expect to receive longevity bonus payments. A 65-year old female might expect about 22 years of bonus payments, a 70-year old female 19 years of payments, and a 75 year old female, on the average, could expect payments for 16 more years. A male 65-years old might expect payments for about 14 years, a 70-year old man 11 years of payments, and a 75-year old man, on average, would enjoy 8 more years of longevity bonus payments.

In closing, we hope that this information will be useful. If we can provide any further assistance on this subject, please let us know. A separate Research Request (No. 83-204) will address the annual costs of various proposed modifications to the existing longevity bonus program.

GK

Attachments

ATTACHMENT A. ANNUAL ALASKA POPULATION DATA, 1970 - 1982

(Source: Alaska Population Overview 1982. Alaska Department
of Labor)

Table II.1

PERSONS BY AGE AND SEX FOR
ALASKA, EACH YEAR: 1970 to 1982

Alaska

July 1													
	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982
TOTAL PERSONS	308500	319600	329800	336400	348100	384100	409800	418000	411600	413700	419700	435200	460800
Under 5 years	32700	33570	34360	34720	35640	38800	41120	41600	40610	40510	40790	41980	44075
5 to 14 years	72290	72640	72690	71890	72160	76950	79570	78790	75330	73510	72390	72860	74830
15 to 64 years	196400	205890	214840	221540	231920	258700	278700	286650	284470	288050	294370	307420	327975
65 years & over	7110	7500	7910	8250	8730	9570	10410	10960	11190	11630	12150	12940	13920
FEMALES	139960	145540	150780	154340	160320	177520	190680	194640	192480	194190	197730	206030	219160
Under 5 years	15900	16370	16750	16910	17350	18930	20020	20260	19760	19710	19830	20430	21400
5 to 14 years	35330	35530	35520	35120	35210	37550	39280	38370	36660	35770	35210	35440	36400
15 to 64 years	85640	90310	94960	98540	103740	116530	126380	130720	130580	132920	136590	143510	154020
65 years & over	3090	3330	3550	3770	4020	4510	5000	5290	5480	5790	6100	6650	7340

ATTACHMENT B. MAN-IN-THE-ARCTIC (MAP) MODEL POPULATION
PROJECTIONS TO THE YEAR 2010 UNDER A BASE CASE SCENARIO

(Institute of Social and Economic Research,
University of Alaska. June 1983)

TABLE N.8. SIMULATION CASE: DEPARTMENT OF REVENUE 50%
Part D
Population
(thousands)

	State	Railbelt	Greater Anchorage	Greater Fairbanks
1982	437.175	307.105	239.555	67.277
1983	457.836	319.767	251.057	68.711
1984	473.750	330.199	259.617	70.523
1985	486.327	339.204	267.539	71.666
1986	499.149	346.988	274.031	72.957
1987	508.054	352.021	277.833	74.190
1988	516.259	356.992	281.952	75.041
1989	523.255	363.345	287.469	75.877
1990	533.184	371.539	294.078	77.461
1991	535.306	372.958	295.108	77.850
1992	550.842	382.528	303.978	78.551
1993	557.199	385.835	306.233	79.602
1994	559.519	389.212	308.219	80.994
1995	563.529	391.838	310.628	81.210
1996	569.216	395.991	314.124	81.868
1997	575.498	401.438	318.628	82.810
1998	581.204	406.133	322.491	83.642
1999	587.213	411.184	326.660	84.524
<u>2000</u>	<u>593.612</u>	<u>416.622</u>	<u>331.082</u>	<u>85.540</u>
2001	599.998	422.232	335.608	86.625
2002	606.741	428.069	340.351	87.718
2003	614.511	434.441	345.608	88.834
2004	622.832	441.222	351.177	90.045
2005	631.699	448.422	357.087	91.336
2006	641.101	456.103	363.376	92.727
2007	651.071	464.117	369.933	94.184
2008	661.676	472.628	376.894	95.735
2009	672.544	481.306	383.955	97.352
2010	684.180	490.620	391.560	99.060

SOURCE: MAP MODEL OUTPUT FILES HE.9 AND HER.9
VARIABLES: POP, P.IR, P.AG, AND P.FG

ATTACHMENT C. ALASKA LONGEVITY BONUS PROGRAM RECIPIENTS
BY HOUSE DISTRICT AND AGE

(Alaska Department of Administration)

DATE 06/25/33

NAME OF HOUSE DISTRICT	HOUSE DIST NO.	TOTAL WARRANTS FOR MONTH NO.	QUALIFIED RECIPIENTS NO.	%	BONUS PAYMENTS FOR THIS MONTH NO.	%	QUALIFIED RECEIVING PAYMENTS %	NO.	BONUS PAYMENTS THIS FISCAL YEAR AMOUNT	%	BONUS PAYMENTS SINCE INCEPTION AMOUNT	%
KECHU-URANG-PETERS	01	901	939	9.61	891	9.45	94.89	2,027	225,250.00	9.34	2,524,350.00	2.8
INSIDE PASSAGE-CORDOVA	02	361	363	3.71	351	3.72	96.69	812	90,250.00	3.74	4,795,075.00	5.3
BARANOF-CHICHAGOF	03	378	333	3.92	372	3.95	97.11	350	94,500.00	3.92	5,567,750.00	6.2
JUNEAU	04	698	710	7.25	683	7.25	76.20	1,570	174,500.00	7.23	8,589,000.00	9.5
KEHAJ-COOK-INLET	05	487	496	5.07	482	5.11	97.18	1,095	121,750.00	5.05	5,446,325.00	6.0
NORTH KEHAJ-SOUTH COAST	06	224	226	2.31	216	2.29	95.53	564	56,000.00	2.32	2,817,750.00	3.1
ANCHORAGE-SOUTH	07	68	64	.65	62	.66	96.83	153	17,000.00	.70	792,300.00	.8
ANCHORAGE-HILLSIDE	08	139	140	1.43	139	1.47	99.29	312	34,750.00	1.44	1,433,650.00	1.6
ANCHORAGE-SAND LAKE	09	127	129	1.32	122	1.29	94.57	285	31,750.00	1.32	1,271,525.00	1.4
ANCHORAGE-MIDTOWN	10	315	319	3.26	310	3.29	97.18	708	78,750.00	3.26	3,525,025.00	3.9
ANCHORAGE-WEST SIDE	11	383	391	4.00	369	3.91	94.37	861	95,750.00	3.97	4,085,100.00	4.5
ANCHORAGE-DOWNTOWN	12	964	983	10.06	940	9.97	95.63	2,169	241,000.00	9.99	2,035,500.00	2.2
ANCHORAGE-MT. VIEW-UNIV.	13	241	236	2.41	232	2.46	98.31	542	60,250.00	2.50	2,509,525.00	2.8
MULDOON	14	134	139	1.42	130	1.38	93.53	301	33,500.00	1.39	1,228,300.00	1.3
CHUGIAK-EAGLE RIVER	15	135	139	1.42	131	1.39	94.24	303	33,750.00	1.40	1,406,450.00	1.5
MATANUSKA-SUSITNA	16	601	605	6.19	587	6.23	97.02	1,352	150,250.00	6.23	7,345,950.00	8.2
ANCHORAGE-INT. HIGHWAYS	17	271	270	2.74	264	2.60	97.78	609	67,750.00	2.31	3,304,650.00	3.6
SOUTHEAST NORTH STAR	18	27	28	.29	27	.29	96.43	60	6,750.00	.28	366,050.00	.4
OUTER FAIRBANKS	19	36	38	.39	36	.38	94.74	81	9,000.00	.37	595,325.00	.6
FAIRBANKS CITY	20	967	989	10.12	955	10.13	96.56	2,175	241,750.00	10.02	1,502,625.00	1.6
WEST FAIRBANKS	21	50	50	.51	50	.53	100.00	112	12,500.00	.52	579,375.00	.6
NORTH SLOPE-KOTZESUE	22	379	380	3.89	375	3.98	98.68	852	94,750.00	3.93	5,282,700.00	5.9
MORTON SOUND	23	455	459	4.59	436	4.63	97.10	1,023	113,750.00	4.72	6,065,250.00	6.7
INTERIOR RIVERS	24	407	406	4.15	394	4.18	97.04	915	101,750.00	4.22	5,283,125.00	5.9
LOWER KUSKOKWIM	25	398	390	3.99	380	4.03	97.54	895	99,500.00	4.12	4,524,625.00	5.0
BRISTOL BAY-ALEUTIANS	26	277	282	2.88	269	2.85	95.74	623	69,250.00	2.87	3,658,475.00	4.0
KODIAK-EAST ALASKA	27	227	232	2.37	223	2.37	96.12	510	56,750.00	2.35	2,989,625.00	3.3
TOTAL		9,650	9,776	100.00	9,426	100.00	96.43	21,699	2,412,500.00	100.00	89,525,400.00	100.0

M

ALBS RECIPIENT AGE BREAK DOWN
AGES NUMBER

65	682
66	732
67	771
68	736
69	685
70	596
71	566
72	538
73	460
74	410
75	389
76	342
77	350
78	291
79	225
80	220
81	187
82	168
83	104
84	107
85	76
86	68
87	53
88	56
89	40
90	46
91	26
92	19
93	16
94	4
95	7
96	6
97	6
98	4
99	6
100	2
101	1
102	2
103	1
104	0
105	0
106	0
107	0
108	0
109	0
110	0
111	0
112	1
113	0
114	0
115	0
116	1



ALASKA STATE LEGISLATURE
HOUSE OF REPRESENTATIVES
RESEARCH AGENCY

Pouch Y. State Capitol
Juneau, Alaska 99811
(907) 465-3991

September 14, 1983

MEMORANDUM

TO: Representative Hugh Malone

FROM: Gretchen Keiser, Legislative Analyst *G. Keiser*

RE: Basic Information on Alaska's Elderly Population
Research Request 83-203 (Additional Information)

Two additional pieces of information have come to my attention regarding Alaska's elderly population since submitting Research Request No. 83-203 on August 31, 1983:

1) Following her review of our August 31, 1983 memorandum, Ms. Marion Shafer (Administrator of the Longevity Bonus Program) informed me that 1979 data exist which document the ethnic composition of bonus recipients. Approximately 30 percent of the recipients were Native and 70 percent were non-Native at that time. This differs quite markedly from the 1976 information (56 percent Native and 44 percent non-Native) reported in the August 31, 1983 memorandum. The 1979 data were obtained by comparing the names of qualified bonus recipients with a BIA tape of Native enrollees, as a result of a case filed with the Alaska Human Rights Commission. Although no current ethnic data exist, Ms. Shafer estimates that the majority of the bonus recipients are non-Native at this time.

2) We just received a set of provisional population projections for 1990 and the year 2000 recently published by the U.S. Bureau of the Census (July 1983). The projections are based on preliminary estimates of net migration between 1970 and 1980. If these estimated rates of net migration (computed by age and sex) for the 1970 to 1980 period were to continue unchanged, Alaska's elderly population is projected to be 24,700 in the year 2000. This projection approximates closely the Bureau's earlier moderate growth projection of 25,300 elderly by the year 2000 discussed in our August 31, 1983 memorandum (pages 10 and 11). We continue to consider this to be a low projection of Alaska's future elderly population given the undercounting bias of the 1980 Census data upon which this is based. Furthermore, using estimates of migration patterns among elderly to and from Alaska between 1970 and 1980 to project population probably overstates elderly migration out of Alaska in the future.

We hope that this information will prove useful to you. We will continue to keep you informed of any additional data regarding Alaska's elderly which become available.

LONGEVITY BONUS STATUS

1. Vest v. State at the Superior Court:

Vest originally sued in the summer of 1982. A three-way agreement was signed by our office, Vest and the Legislative Council staying the case through the 1983 legislative session, on the Council's agreement to use its best efforts to enact legislation which treated all senior Alaskans equally. No legislation was enacted, and Vest reactivated the suit shortly after the close of the session.

Vest filed a short summary judgment memorandum arguing that the residency requirements (25 years continuous residency, and residency in the territory prior to statehood) were invalid after the U.S. Supreme Court decision in Zobel. He also argued that the provisions violated the Citizenship Clause and the Alaska equal protection clause. Finally, he argued that the residency provisions should be stricken from the act, and the program opened up to all residents.

The state argued that Zobel was not a per se bar to residency requirements, that the court should judge the program under the federal rational basis test, that states have broad leeway in deciding whom to benefit when distributing state resources, and that there were valid, rational reasons for favoring pre-statehood residents over those who came later. The state also argued that the residency requirements were not severable from the remainder of the act, and if they were invalid the court could not open up the program.

Judge Carpeneti ruled on December 17, 1983 in favor of Vest on all arguments except severability. He found that the act infringed the federally protected right-to-travel and applied the strict scrutiny test, noting that the program did not merely delay benefits, as in Sosna v. Iowa, 419 U.S. 393 (1975) (one year requirement for divorce not invalid), but rather denied newer arrivals entirely of the ability to participate in the program. He further read Zobel as implying that the U.S. Supreme Court would have applied strict scrutiny in that case if it had reached the issue. Once determining that strict scrutiny applied, the court held the residency requirements invalid since there was no compelling state interest to support them.

Judge Carpeneti enjoined the program, and stayed his own order for 30 days. The state filed its appeal, and then moved for an extended stay pending final disposition by the state supreme court. The state's motion was granted on January 13, 1984.

2. State v. Vest, Supreme Court:

On January 10, 1984, Judge Carpeneti reduced his order to a written judgment, thus preparing the way for appeal. The state's appeal papers were filed that day. The appellate rules provide that the superior court has 40 days to certify the record (about February 20, but since the record is relatively small, it may take less time), the state then has 30 days to file its appeal brief (about March 22), Vest has 30 days to answer (about April 22) and the state has 20 days to reply (about May 12). Vest's counsel have talked about moving for expedited treatment, but to date have not filed such a motion.

3. Other considerations:

The drafters of any legislation replacing the present program should consider the proposed program with an eye to the federal eligibility rules for Supplemental Social Security. Our adult public assistance program (blind, disabled and aged) is tied to those rules. The federal statute and regulations are attached, and provide for two relevant exemptions for "income."

One deals specifically with our program (although not by name) and exempts payments under a program enacted prior to July 1, 1973 if payments are not based on need and are based solely on the recipient's attainment of age 65 and duration of residence in the state. An amendment to the present act reducing the residency requirement to one year would come within this exemption.

The second exemption is for assistance which is based on need and furnished by a state or subdivision. The statute is silent on what constitutes "need," but the regulation states that "assistance is based on need when it is provided under a program which uses the amount of your income as one factor to determine your eligibility." Thus we believe that any program with an income cap would come within this exemption.

chapter, which is to pay benefits only to the extent an individual's basic subsistence needs are not provided from other sources; use of a presumed value to allow the agency to avoid complex, individualized computations was not unreasonable, particularly in view of the fact that the presumption creates a maximum reduction in benefits and may be rebutted by a recipient. *Wynn v. Harris*, D.C.Tenn.1980, 494 F.Supp. 878.

As regarded regulation pursuant to which the recipients' supplemental security income benefits were reduced based on their alleged receipt of in-kind support and maintenance benefits amounting to the difference between the amount of rent they paid and the current retail value of their housing, the decision by the Secretary to utilize current market value was clearly reasonable, whether or not other methods might be equally reasonable or even superior; in addition, the absence of empirical data underlying the one-third presumptive reduction in benefits did not render the regulation arbitrary. *Id.*

Under regulations setting forth requirements for an approved state program of aid to the aged, blind and disabled under this chapter to effect that amount of property that could be reserved for each individual recipient should not be in excess of \$2,000, requirement would be construed as applying to savings derived from any source, including savings from aid to the aged, blind and disabled benefits and, thus, in order to have had an "approved" plan, New York must have imposed a ceiling of no more than \$2,000 on such savings. *Yulling v. California*, D.C.N.Y.1979, 474 F.Supp. 601.

§ 1382a. Income: definition of earned and unearned income; exclusions from income

(a) For purposes of this subchapter, income means both earned income and unearned income; and—

(1) earned income means only—

(A) wages as determined under section 403(f)(5)(C) of this title;

(B) net earnings from self-employment, as defined in section 411 of this title (without the application of the second and third sentences following subsection (a)(11), and the last paragraph of subsection (a)), including earnings for services described in paragraphs (4), (5), and (6) of subsection (c);

(C) any refund of Federal income taxes made by reason of section 43 of Title 26 (relating to earned income credit) and any payment made by an employer under section 3507 of Title 26 (relating to advance payment of earned income credit); and

(D) remuneration received for services performed in a sheltered workshop or work activities center; and

(2) unearned income means all other income, including—

(A) support and maintenance furnished in cash or kind; except that (i) in the case of any individual (and his eligible spouse, if any) living in another person's household and receiving support and maintenance in kind from such person, the dollar amounts otherwise applicable to such individual (and spouse) as specified in subsections (a) and (b) of section 1382 of this title shall be reduced by 33 1/3 percent in lieu of including such support and maintenance in the unearned income of such individual (and spouse) as otherwise required by this subparagraph, (ii) in the case of any individual or his eligible spouse who resides in a nonprofit retirement home or similar nonprofit institution, support and maintenance shall not be included to the extent that it is

New York program of aid to the aged, blind and disabled did impose limit on savings from resources and, thus, was an approved plan within meaning of the federal supplemental security income regulations. *Id.*

27. Incremental method

In regard to public households containing persons receiving benefits under old age, survivors and disability insurance program or under supplemental security income program, appropriate method of calculating public assistance for remaining eligible household members was "incremental" method, under which only eligible persons were counted in order to determine household's size before referring to schedules to find appropriate fixed allowance, rather than "proration" method, under which two-thirds of three person grant would be authorized for households containing one ineligible and two eligible persons. *Leone v. Blum*, 1980, 425 N.Y.S.2d 836, 73 A.D.2d 252, certification denied 431 N.Y.S.2d 514, 50 N.Y.2d 1042, 410 N.E.2d 747, affirmed 440 N.Y.S.2d 604, 53 N.Y.2d 105, 423 N.E.2d 27.

28. Lump-sum payment

Practice of Secretary in including a lump-sum social security payment for purposes of determining available resources of an applicant under regulation providing that in order to be eligible for supplemental security income payment a single individual may not have resources of more than \$1,500 is consistent with the statutory scheme; therefore, applicant who was paid approximately \$11,500 in a lump-sum supplemental security income payment was not entitled to receive monthly benefits. *Beatty v. Schweiker*, C.A.Pa.1982, 678 F.2d 359.

furnished to such individual or payment therefor (unless such payment to furnish full support without any current or future made by another nonprofit or shall not be included and the case of any individual (a: which begins with the month: his eligible spouse) began to re a residential facility (including person and ends with the close individual and his eligible spouse while living in such a residence: seventeenth month following more than 30 days prior to individual and his eligible spouse while living in such a residence individual and his eligible spouse by such individual (or by such home, (II) there occurred with (and while such individual, or the household referred to in the President declared a major Disaster Relief Act of 1974 individual declares that he is living in the household referred to: phe;

[See main volume]

(b) In determining the income of a: be excluded—

[See main volume]

(2)(A) the first \$240 per year (periods) of income (whether earned on the basis of the need of the e

(B) monthly (or other periodic program established prior to July of which the individual receiving any individual for such payment attainment of age 65 and duration

(3)(A) the total unearned income a month which, as determined Secretary, is received too infrequently so received does not exceed income of such individual (and determined in accordance with irregularly to be included, if such month;

[See main volume]

(B) if such individual (or such spouse) attained age 65, or received benefits approved under section 1352 or 1352 which he attained age 65), (i) the amounts for shorter periods) of e: paragraphs of this subsection, (ii) such individual (for purposes of determining subchapter and of determining his or months of eligibility after the initial disability is sufficiently severe to require in order for him to work, as may be attendant care services, medical device services (not including routine drugs

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furnished to such individual or such spouse without such institution receiving payment therefor (unless such institution has expressly undertaken an obligation to furnish full support and maintenance to such individual or spouse without any current or future payment therefor) or payment therefor is made by another nonprofit organization, and (iii) support and maintenance shall not be included and the provisions of clause (i) shall not be applicable in the case of any individual (and his eligible spouse, if any) for the period which begins with the month in which such individual (or such individual and his eligible spouse) began to receive support and maintenance while living in a residential facility (including a private household) maintained by another person and ends with the close of the month in which such individual (or such individual and his eligible spouse) ceases to receive support and maintenance while living in such a residential facility (or, if earlier, with the close of the seventeenth month following the month in which such period began), if, not more than 30 days prior to the date on which such individual (or such individual and his eligible spouse) began to receive support and maintenance while living in such a residential facility, (I) such individual (or such individual and his eligible spouse) were residing in a household maintained by such individual (or by such individual and others) as his or their own home, (II) there occurred within the area in which such household is located (and while such individual, or such individual and his spouse, were residing in the household referred to in subclause (I)) a catastrophe on account of which the President declared a major disaster to exist therein for purposes of the Disaster Relief Act of 1974 [42 U.S.C.A. § 5121 et seq.], and (III) such individual declares that he (or he and his eligible spouse) ceased to continue living in the household referred to in subclause (II) because of such catastrophe;

[See main volume for text of (B) to (F)]

(b) In determining the income of an individual (and his eligible spouse) there shall be excluded—

[See main volume for text of (1)]

(2)(A) the first \$240 per year (or proportionately smaller amounts for shorter periods) of income (whether earned or unearned) other than income which is paid on the basis of the need of the eligible individual;

(B) monthly (or other periodic) payments received by any individual, under a program established prior to July 1, 1973, if such payments are made by the State of which the individual receiving such payments is a resident, and if eligibility of any individual for such payments is not based on need and is based solely on attainment of age 65 and duration of residence in such State by such individual;

(3)(A) the total unearned income of such individual (and such spouse, if any) in a month which, as determined in accordance with criteria prescribed by the Secretary, is received too infrequently or irregularly to be included, if such income so received does not exceed \$20 in such month and (B) the total earned income of such individual (and such spouse, if any) in a month which, as determined in accordance with such criteria, is received too infrequently or irregularly to be included, if such income so received does not exceed \$10 in such month;

[See main volume for text of (4)(A)]

(B) if such individual (or such spouse) is disabled but not blind (and has not attained age 65, or received benefits under this subchapter (or aid under a State plan approved under section 1352 or 1382 of this title) for the month before the month in which he attained age 65), (i) the first \$780 per year (or proportionately smaller amounts for shorter periods) of earned income not excluded by the preceding paragraphs of this subsection, (ii) such additional amounts of earned income of such individual (for purposes of determining the amount of his or her benefits under this subchapter and of determining his or her eligibility for such benefits for consecutive months of eligibility after the initial month of such eligibility), if such individual's disability is sufficiently severe to result in a functional limitation requiring assistance in order for him to work, as may be necessary to pay the costs (to such individual) of attendant care services, medical devices, equipment, prostheses, and similar items and services (not including routine drugs or routine medical services unless such drugs or

services are necessary for the control of the disabling condition) which are necessary (as determined by the Secretary in regulations) for that purpose, whether or not such assistance is also needed to enable him to carry out his normal daily functions, except that the amounts to be excluded shall be subject to such reasonable limits as the Secretary may prescribe, (iii) one-half of the amount of earned income not excluded after the application of the preceding provisions of this subparagraph, and (iv) such additional amounts of other income, where such individual has a plan for achieving self-support approved by the Secretary, as may be necessary for the fulfillment of such plan, or

[See main volume for text of (C) and (5)]

(6) assistance, furnished to or on behalf of such individual (and spouse), which is based on need and furnished by any State or political subdivision of a State;

[See main volume for text of (7) and (8)]

(9) if such individual is a child one-third of any payment for his support received from an absent parent;

(10) any amounts received for the foster care of a child who is not an eligible individual but who is living in the same home as such individual and was placed in such home by a public or nonprofit private child-placement or child-care agency;

(11) assistance received under the Disaster Relief Act of 1974 [42 U.S.C.A. § 5121 et seq.] or other assistance provided pursuant to a Federal statute on account of a catastrophe which is declared to be a major disaster by the President;

(12) interest income received on assistance funds referred to in paragraph (11) within the 9-month period beginning on the date such funds are received (or such longer periods as the Secretary shall by regulations prescribe in cases where good cause is shown by the individual concerned for extending such period); and

(13) any assistance received to assist in meeting the costs of home energy, including both heating and cooling, which (as determined under regulations of the Secretary by such State agency as the chief executive officer of the State may designate) (A) is based on need for such assistance, and (B) is (i) assistance furnished in kind by a private nonprofit agency, or (ii) assistance furnished by a supplier of home heating oil or gas, by an entity providing home energy whose revenues are primarily derived on a rate-of-return basis regulated by a State or Federal governmental entity, or by a municipal utility providing home energy.

(As amended Oct. 26, 1974, Pub.L. 93-484, § 4, 89 Stat. 1460; Jan. 2, 1976, Pub.L. 94-202, § 9, 89 Stat. 1140; June 30, 1976, Pub.L. 94-331, §§ 2(a), 4(a), 90 Stat. 781, 782; Oct. 4, 1976, Pub.L. 94-455, Title XXI, § 2125, 90 Stat. 1920; Oct. 20, 1976, Pub.L. 94-566, Title V, § 505(b), 90 Stat. 2686; Nov. 12, 1977, Pub.L. 95-171, § 8(a), 91 Stat. 1355; Apr. 1, 1980, Pub.L. 96-222, Title I, § 101(a)(2)(B), 94 Stat. 195; June 9, 1980, Pub.L. 96-265, Title II, § 202(a), Title III, § 302(b), 94 Stat. 449, 451. Oct. 19, 1980, Pub.L. 96-473, § 6(g), 91 Stat. 2266; Aug. 13, 1981, Pub.L. 97-35, Title XXIII, § 2341(b) 95 Stat. 865; Jan. 6, 1983, Pub.L. 97-424, Title V, § 545(a), 96 Stat. 2198.)

1 So in original. There is no closing parenthesis.

References in Text. The Disaster Relief Act of 1974, referred to in text, is Pub.L. 93-288, May 22, 1974, 88 Stat. 143, which is classified principally to chapter 68 (section 5121 et seq.) of this title. For distribution in the Code of such Act, see Short Title note set out under section 5121 of this title.

1981 Amendment. Subsec. (b)(3). Pub.L. 97-35 substituted "month" for "calendar quarter" wherever appearing, "such month" for "such quarter" wherever appearing, "\$20" for "\$60", and "\$10" for "\$30".

1980 Amendments. Subsec. (a)(1). Pub.L. 96-473, § 6(e)(1), (2), in subpar. (B) substituted "(11)" for "(10)", and redesignated second subpar. (C) relating to remuneration received for services in a sheltered workshop, etc., as (D).

Subsec. (a)(1)(C). Pub.L. 96-265, § 202(a), added subsec. (a)(1)(C).

Subsec. (a)(1)(C). Pub.L. 96-222 added subsec. (a)(1)(C).

Subsec. (b)(2)(B). Pub.L. 96-473, § 6(g)(3) substituted "monthly" for "Monthly" and "individual;" for "individual.", which changes had been made editorially for purposes of codification, thereby requiring no further changes in text.

Subsec. (b)(4)(B). Pub.L. 96-265, § 302(b), added provisions relating to extraordinary work expenses due to severe disability.

1977 Amendment. Subsec. (b)(12). Pub.L. 95-171 added par. (12).

1976 Amendments. Subsec. (a)(2)(A). Pub.L. 94-331, § 4(a), added cl. (iii).

Subsec. (a)(2)(A)(iii). Pub.L. 94-455 substituted in parenthetical text "seventeenth month" for "fifth month".

Subsec. (b). Pub.L. 94-331, § 2(a), added par. (11).

Subsec. (b)(2). Pub.L. 94-202 designated existing provisions as subpar. (A) and added subpar. (B).

Subsec. (b)(6). Pub.L. 94-566 substituted "assistance, furnished to or on behalf of such individual (and spouse), which" for "assistance described in section 1382(a) of this title which".

1974 Amendment. Subsec. (a)(2)(A). Pub.L. 93-484 designated existing provisions as cl. (i) and added cl. (iii).

Effective Date of 1981 Amendment. Amendment by Pub.L. 97-35 effective with respect to months after the first calendar quarter which ends more than five months after August, 1981, with provision for transitional payments, see section 2341(c) of Pub.L. 97-35, set out as a note under section 1382 of this title.

Effective Date of 1980 Amendments. Section 202(b) of Pub.L. 96-265 provided that: "The amendments made by subsection (a) [enacting subsec. (a)(1)(C) of this section] shall apply only with respect to remuneration received in months after September 1980."

Insertion in subsec. (b)(4)(B) of this section by section 302(b) of Pub.L. 96-265 of reference to extraordinary work expenses due to severe disability applicable with respect to expenses incurred on or after the first day of the sixth month which begins after June 9, 1980, see section 302(c) of Pub.L. 96-265, set out as a note under section 423 of this title.

Amendment by Pub.L. 96-222 applicable to payments for months beginning after Dec. 31, 1979, see section 101(b)(1)(B) of Pub.L. 96-222, set out as a note under section 602 of this title.

Effective Date of 1977 Amendment. Section 8(b) of Pub.L. 95-171 provided that: "The amendment made by this section [enacting subsec. (b)(12) of this section] shall be effective July 1, 1976, with respect to catastrophes which occurred on or after June 1, 1976, and before December 31, 1976. With respect to catastrophes which occurred on or after December 31, 1976, the amendment made by this section [enacting subsec. (b)(12) of this section] shall be effective the first day of the calendar quarter following enactment of this Act [Nov. 12, 1977]."

Effective Date of 1976 Amendments. Amendment by Pub.L. 94-566 effective Oct. 1, 1976, see section 505(c) of Pub.L. 94-566, set out as a note under section 1382 of this title.

Section 2(b) of Pub.L. 94-331, as amended by Pub.L. 95-171, § 6(a), Nov. 12, 1977, 91 Stat. 1355, effective the first day of calendar quarter following Nov. 12, 1977, provided that: "The Amendments made by this Act [amending subsec. (b)(11) of this section and sections 515, 3402, 6153, and 6154 of Title 26, and enacting provisions set out as notes under sections 515 and 3402 of Title 26] shall be applicable only in the case of catastrophes which occur on or after June 1, 1976."

Section 4(b) of Pub.L. 94-331, as amended by Pub.L. 95-171, § 7(a), Nov. 12, 1977, 91 Stat. 1355, effective the first day of calendar quarter following Nov. 12, 1977, provided that: "The

CFR

§ 416.1124

Title 20—Employees' Benefits

earned income received in that period. Rather than reducing your SSI payments in quarters prior to your receipt of a retroactive monthly social security benefit, we will reduce the retroactive social security benefits by an amount equal to the amount of SSI payments (including federally administered State supplementary payments) that we would not have paid to you if your social security benefits had been paid when regularly due rather than retroactively (see § 404.408b(b)). If a balance is due you from your retroactive social security benefits after this reduction, for SSI purposes we will not count the balance as unearned income in a subsequent quarter in which you receive it. This is because your social security benefits were used to determine the amount of the reduction. This exception to the unearned income counting rule does not apply to any monthly social security benefits for a period for which you did not receive SSI.

OMB CONTROL No.: 0960-0123 for § 416.1123(b).

[45 FR 65547, Oct. 3, 1980, as amended at 47 FR 4988, Feb. 3, 1982; 47 FR 13794, Apr. 1, 1982]

§ 416.1124 Unearned income we do not count.

(a) *General.* While we must know the source and amount of all of your unearned income for SSI, we do not count all of it to determine your eligibility and benefit amount. We first exclude income as authorized by other Federal laws (see paragraph (b) of this section). Then we apply the other exclusions in the order listed in paragraph (c) of this section to the rest of your unearned income in the calendar quarter. We never reduce your unearned income below zero or apply any unused unearned income exclusion to earned income except for the \$80 general exclusion described in paragraph (c)(10) of this section.

(b) *Other Federal laws.* Some Federal laws other than the Social Security Act provide that we cannot count some of your unearned income for SSI purposes. We list the laws and the exclusions in the appendix to this subpart which we update periodically.

(c) *Other unearned income we do not count.* We do not count as unearned income—

(1) Any public agency's refund of taxes on real property or food;

(2) Assistance based on need which is wholly funded by a State or one of its political subdivisions. (For purposes of this rule, an Indian tribe is considered a political subdivision of a State.) Assistance is based on need when it is provided under a program which uses the amount of your income as one factor to determine your eligibility. Assistance based on need includes State supplementation of Federal SSI benefits as defined in Subpart T of this part but does not include payments under a Federal/State grant program such as Aid to Families with Dependent Children under title IV-A of the Social Security Act;

(3) Any portion of a grant, scholarship, or fellowship used for paying tuition, fees, or other necessary educational expenses. However, we do count any portion set aside or actually used for food, clothing, or shelter;

(4) Food which you or your spouse raise if it is consumed by you or your household;

(5) Assistance received under the Disaster Relief Act of 1974 and assistance provided under any Federal statute because of a catastrophe which the President of the United States declares to be a major disaster. See § 416.1150 for a more detailed discussion of this assistance, particularly the treatment of in-kind support and maintenance received as the result of a major disaster;

(6) Up to \$60 of unearned income in a calendar quarter if you receive it infrequently or irregularly; that is, if you receive it only once during the quarter or if you cannot reasonably expect to receive it. If the total amount of infrequent or irregular unearned income you receive in a quarter exceeds \$60, we cannot use this exclusion;

(7) Periodic payments made by a State under a program established before July 1, 1973, and based solely on your length of residence and attainment of age 65;

(8) Payments for providing foster care to an ineligible child who was

placed in your home by a public or private nonprofit child placement or child care agency;

(9) One-third of support payments made to or for you by an absent parent if you are a child;

(10) The first \$60 (or proportionately less for less than a full quarter) of any unearned income in a calendar quarter other than income based on need. Income based on need is a benefit that uses the amount of your income as a factor to determine your eligibility. The \$60 exclusion does not apply to a benefit based on need that is totally or partially funded by the Federal government or by a nongovernmental agency. (However, assistance which is based on need and funded wholly by a State or one of its political subdivisions is excluded totally from income as described in § 416.1124(c)(2).) If you receive less than \$60 of unearned income in a quarter and you have earned income in that quarter, we will use the rest of the \$60 exclusion to reduce the amount of your countable earned income; and

(11) Any unearned income you receive and use to fulfill an approved plan for achieving self-support, if you are blind or disabled. See §§ 416.1180 through 416.1182 for an explanation of plans to achieve self-support and for the rules on when this income exclusion applies.

(12) Any interest earned on excluded burial funds and any appreciation in the value of an excluded burial arrangement which are left to accumulate and become a part of the separately identifiable burial fund. (See § 416.1231 for an explanation of the exclusion of burial assets.) This exclusion from income applies to interest earned on burial funds or appreciation in value of excluded burial arrangements which occur beginning November 1, 1982, or the date you first become eligible for SSI benefits, if later.

[45 FR 65547, Oct. 3, 1980, and 47 FR 55213, Dec. 8, 1982]

IN-KIND SUPPORT AND MAINTENANCE

§ 416.1130 Introduction.

(a) *General.* Both earned income and unearned income include items received in kind (§ 416.1102). Generally we value in-kind items at their current market value and we apply the various exclusions for both earned and unearned income. However, we have special rules for valuing food, clothing, or shelter that is received as unearned income (in-kind support and maintenance). This section and the ones that follow discuss these rules.

(b) *How we define in-kind support and maintenance.* In-kind support and maintenance means any food, clothing, or shelter that is given to you or that you receive because someone else pays for it. Shelter includes room, rent, mortgage payments, real property taxes, heating fuel, gas, electricity, water, sewerage, and garbage collection services. You are not receiving in-kind support and maintenance in the form of room or rent if you are paying the amount charged under a business arrangement.

(c) *How we value in-kind support and maintenance.* Essentially, we have two rules for valuing the in-kind support and maintenance which we must count. The one-third reduction rule applies if you are living in the household of a person who provides you with both food and shelter (§§ 416.1131 through 416.1133). The presumed value rule applies in all other situations where you are receiving countable in-kind support and maintenance (§§ 416.1140 through 416.1145). In some living arrangements, if certain conditions exist, we do not count in-kind support and maintenance. These are discussed in §§ 416.1141 through 416.1145. Also, we apply special rules when members of a couple have different living arrangements (§ 416.1147).

§ 416.1131 The one-third reduction rule.

(a) *What the rule is.* Instead of determining the actual dollar value of in-kind support and maintenance, we reduce the Federal benefit rate by one-third if you (or you and your eligible spouse)—

2/3/84

Total L.B. Costs (Actual)

C.S.S.B. 347

FY85	Administration (reg.)	\$ 269,400	GF
	Additional Administration	171,700	GF
	Grants (16,500 x 12 x \$196)	38,900,000	PF
	Retroactive Payments	18,456,000	GF
	Total	\$ 57,797,100	

FY86	Admin.	\$ 269,400	GF
	Addl. Admin.	115,200	GF
	Grants (17,220 x 12 x \$206)	42,567,840	PF
	Total	\$ 42,952,440	

FY87	Admin.	\$ 269,400	GF
	Addl. Admin.	115,700	GF
	Grants (17,940 x 12 x \$212)	45,639,360	PF
	Total	\$ 46,024,460	

FY88	Admin.	\$ 269,400	GF
	Addl. Admin.	116,200	GF
	Grants (18,660 x 12 x \$218)	48,814,560	PF
	Total	\$ 49,200,160	

FY89	Admin.	\$ 269,400	GF
	Addl. Admin.	116,700	GF
	Grants (19,380 x 12 x \$225)	52,326,000	PF
	Total	\$ 52,712,100	

Grants Budget

if L.B. program is unchanged

FY85. (based on growth of 60

per month over present enrollment)

10,348 persons @ \$250/mo. = \$3,044.

FY86. (growth of 60/mo.)

11,068 persons @ \$250/mo. = 33,204.

FY87

11,788

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"

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= 35,364.

FY88

12,508

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= 37,524.

FY89

13,228

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= 39,684.

FY90

13,948

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= 44,844.

FY91

14,668

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= 44,004.

FY92

15,388

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= 46,164.

FY93

16,108

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= 48,324.

FY94

16,828

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= 50,484.

03-02-04-00-00 (02-22-3-07-00-00)

STATE OF ALASKA -- COMPONENT_BUDGET_SUMMARY

07:57

1/03/84

AGENCY: DEPARTMENT OF ADMINISTRATION
CATEGORY: SOCIAL SERVICESPROGRAM: LONGEVITY BONUS
SUB-PROGRAM: LONGEVITY BONUS

EXPENDITURES & FUNDING	83 AUTH	83 FINAL	83 ACT	84 AUTH	ADJ BASE	85 SL 1	85 SL 2	85 SL 3	85 SL 4	GOVERNOR
01 PERS. SERV.	156.6	156.6	169.4	159.4	164.7	175.6	161.0	161.0	175.6	175.6
02 TRAVEL	4.4	4.4	1.7	4.0	4.0	4.0	3.8	3.8	4.0	4.0
03 CONTRACTUAL	106.0	106.0	84.6	81.1	81.1	81.1	77.0	77.0	85.6	85.6
04 SUPPLIES	3.5	3.5	1.0	3.5	3.5	3.5	3.3	3.3	3.5	3.5
05 EQUIPMENT			.4						.7	.7
06 LANDS/BLDGS										
07 GRANTS, CLMS	27944.0	27944.0	27504.5	30211.5	30211.5	29749.5	26963.8	27468.1	32551.5	32551.5
08 MISC.										
** TOTAL EXPEND	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
09 I-A TRANSFER	26.1	26.1	26.1	2.1		24.7	23.4	23.4	26.2	26.2
FED. RECEIPT										
**GF + MATCH	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
G. F. MATCH										
GENERAL FUND	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
PGM RECEIPTS										
I/A RECEIPTS										
OTHER FUNDS										
15 FULL-TIME	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
16 PART-TIME										
17 TEMPORARY										

000042A

THE STATUS OF OLDER ALASKANS

1980 DATA BASE

Prepared for
The Older Alaskans Commission

Prepared by
The Institute of Social and Economic Research
University of Alaska

June 1983

TABLE OF CONTENTS

INTRODUCTION	1
STATEWIDE DATA TABLES	2
Table 1. Number of Persons 55 Years and Over, by Age	3
Table 2. Percent Distribution of Persons Over 55 Years of Age	4
Table 3. Number of Persons 55 Years and Older by Age and Sex	6
Table 4. Number of Persons 65 Years and Older by Race	7
Table 5. Percent Distribution of Persons 65 Years and Older by Race	8
Table 6. Number of Persons 65 Years and Over By Type of Living Arrangement	9
Table 7. Householders 65 Years and Older by Housing Tenure Status	11
Table 8. Persons 65 Years and Over by Poverty Status	12
Table 9. Persons 65 Years and Older by Type of Place and Race	14
Table 10. Native Persons 65 Years and Older by Census Division	15
CENSUS AREA DATA TABLES	16
Tables 11 and 12. Aleutian Islands Census Area	17
Tables 13 and 14. Anchorage Borough	18
Tables 15 and 16. Bethel Census Division	19
Tables 17 and 18. Bristol Bay Borough	20
Tables 19 and 20. Dillingham Census Division	21
Tables 21 and 22. Fairbanks North Star Borough	22
Tables 23 and 24. Haines Borough	23
Tables 25 and 26. Juneau Borough	24
Tables 27 and 28. Kenai Peninsula Borough	25
Tables 29 and 30. Ketchikan Gateway Borough	26
Tables 31 and 32. Kobuk Census Division	27
Tables 33 and 34. Kodiak Island Borough	28
Tables 35 and 36. Matanuska-Susitna Borough	29
Tables 37 and 38. Nome Census Division	30
Tables 39 and 40. North Slope Borough	31
Tables 41 and 42. Prince of Wales-Outer Ketchikan Census Div.	32
Tables 43 and 44. Sitka Borough	33
Tables 45 and 46. Skagway-Yakutat-Angoon Census Division	34
Tables 47 and 48. Southeast Fairbanks Census Division	35
Tables 49 and 50. Valdez-Cordova Census Division	36
Tables 51 and 52. Wade Hampton Census Division	37
Tables 53 and 54. Wrangell-Petersburg Census Division	38
Tables 55 and 56. Yukon-Koyukuk Census Division	39

LIST OF FIGURES

Figure 1. Distribution of Persons 55 Years and Over By Age: Statewide	5
Figure 2. Distribution of Persons 65 Years and Over By Type of Living Arrangements: Statewide	10
Figure 3. Distribution of Persons 65 Years and Over By Poverty Status: Statewide	13

INTRODUCTION

The data base contained in this report was prepared by the Institute of Social and Economic Research (ISER) under a Request for Services Agreement (RSA) from the Older Alaskans Commission (OAC). The 1970 data were extracted from Census Tapes CNT-1, CNT-2, and CNT-5. The 1980 data were extracted from Census Tapes STF-1, STF-2, and STF-3A. To make intercensal year comparisons, the 1970 data were reformatted to conform to the 1980 census area boundary definitions before being merged into the data base.

The principal investigator for ISER was Professor Theodore Lane. ISER Research Associate Jim Kerr was responsible for programming and data management. The project manager for the OAC was its Executive Director, Jon Wolfe.

The data base contained in this report is the first part of an effort by the OAC to identify longer-term trends in the number of older Alaskans, their geographic distribution, status, and needs. It is anticipated that this effort will generate additional reports during 1983, expanding the data base and analyzing pertinent trends.

STATEWIDE DATA TABLES

TABLE 1. NUMBER OF PERSONS 55 YEARS AND OVER, BY AGE
STATE OF ALASKA
1970 AND 1980

	Total		% Distribution		55-59 Years		60-64 Years		65-74 Years		75 + Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
Alaska	20747	32260	100.0	100.0	8550	12617	5310	8096	4704	8312	2183	3235
Aleutian Islands	282	332	1.4	1.0	136	144	80	81	46	86	20	21
Anchorage Borough	6465	11945	31.4	37.0	3015	5355	1721	3070	1185	2623	544	897
Bethel Census Div.	599	967	2.9	3.0	227	283	133	253	149	314	90	117
Bristol Bay Borough	65	66	0.3	0.2	20	19	19	22	21	17	5	8
Dillingham Census Div.	323	405	1.6	1.3	114	140	92	96	87	116	30	53
Fairbanks North Star	2180	3751	10.6	11.6	1031	1486	576	989	397	914	176	362
Haines Borough	200	223	1.0	0.7	81	80	45	6	50	67	24	11
Juneau Borough	1510	1990	7.3	6.2	588	716	410	503	363	557	149	214
Kenai Peninsula Borough	1376	2365	6.7	7.3	557	865	349	653	339	633	131	194
Ketchikan Gateway Bor.	1239	1501	6.0	4.7	421	511	303	348	352	427	163	215
Kobuk Census Division	356	470	1.7	1.5	120	127	79	94	99	166	58	83
Kodiak Island Borough	604	743	2.9	2.3	243	291	151	197	148	179	62	76
Matanuska-Susitna Bor.	818	1793	4.0	5.6	299	621	211	442	223	519	85	211
Nome Census Division	569	689	2.8	2.1	217	212	127	138	165	249	60	90
North Slope Borough	242	331	1.2	1.0	87	112	60	71	63	114	32	34
Prince of Wales	382	376	1.9	1.2	144	130	109	95	89	98	40	53
Sitka Borough	748	789	3.6	2.4	239	265	149	163	202	200	158	161
Skagway-Yakutat	388	415	1.9	1.3	122	135	75	88	135	126	55	66
Southeast Fairbanks	101	363	0.5	1.1	52	139	25	82	18	95	6	47
Valdez-Cordova Census D.	584	807	2.8	2.5	230	319	165	193	129	212	60	83
Wade Hampton Census Div.	263	430	1.3	1.3	95	163	65	39	71	130	32	48
Wrangell-Petersburg	627	806	3.0	2.5	210	252	158	201	169	244	90	109
Yukon-Koyukuk Census D.	644	703	3.1	2.2	240	232	164	163	154	226	86	82
Total	20565	32260	100.0	100.0	8488	12617	5267	8096	4654	8312	2156	3235

Note: 1970 Census Division totals may not equal Alaska total due to reporting changes.

TABLE 2. PERCENT DISTRIBUTION OF PERSONS OVER 55 YEARS OF AGE
STATE OF ALASKA
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75 + Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
Alaska	20747	32260	41.2%	39.1%	25.6%	25.1%	22.7%	25.8%	10.5%	10.0%
Aleutian Islands	282	332	48.2	43.4	28.4	24.4	16.3	25.9	7.1	6.3
Anchorage Borough	6465	11945	46.6	44.8	26.6	25.7	18.3	22.0	8.4	7.5
Bethel Census Div.	599	967	37.9	29.3	22.2	26.2	24.9	32.5	15.0	12.1
Bristol Bay Borough	65	66	30.8	28.8	29.2	33.3	32.3	25.8	7.7	12.1
Dillingham Census Div.	323	405	35.3	34.6	28.5	23.7	26.9	28.6	9.3	13.1
Fairbanks North Star	2180	3751	47.3	39.6	26.4	26.4	18.2	24.4	8.1	9.7
Haines Borough	200	223	40.5	35.9	22.5	29.1	25.0	30.0	12.0	4.9
Juneau Borough	1510	1990	38.9	36.0	27.2	25.3	24.0	28.0	9.9	10.0
Kenai Peninsula Borough	1376	2365	40.5	37.4	25.4	27.6	24.6	26.8	9.5	8.2
Ketchikan Gateway Bor.	1239	1501	34.0	34.0	24.5	23.2	28.4	28.4	13.2	14.3
Kobuk Census Division	356	470	33.7	27.0	22.2	20.0	27.8	35.3	16.3	17.7
Kodiak Island Borough	604	743	40.2	39.2	25.0	26.5	24.5	24.1	10.3	10.2
Matanuska-Susitna Bor.	818	1793	36.6	34.6	25.8	24.7	27.3	28.9	10.4	11.8
Nome Census Division	569	689	30.1	30.8	22.3	20.0	29.0	36.1	10.5	13.1
North Slope Borough	242	331	36.0	33.8	24.8	21.5	26.0	34.4	13.2	10.3
Prince of Wales	302	376	37.7	34.6	20.5	25.3	23.3	26.1	10.5	14.1
Sitka Borough	748	789	32.0	33.6	19.9	20.7	27.0	25.3	21.1	20.4
Skagway-Yakutat	388	415	31.4	32.5	19.6	21.2	34.8	30.4	14.2	15.9
Southeast Fairbanks	101	363	51.5	38.3	24.8	22.6	17.8	26.2	5.9	12.9
Valdez-Cordova Census D.	584	807	39.4	39.5	28.3	23.9	22.1	26.3	10.3	10.3
Wade Hampton Census Div.	263	430	36.1	37.9	24.7	20.7	27.0	30.2	12.2	11.2
Wrangell-Petersburg	627	806	33.5	31.3	25.2	24.9	27.0	30.3	14.4	13.5
Yukon-Koyukuk Census D.	644	703	37.3	33.0	25.5	23.2	23.9	32.1	13.4	11.7

Figure 1

Distribution of Persons 55 Years and Older by Age

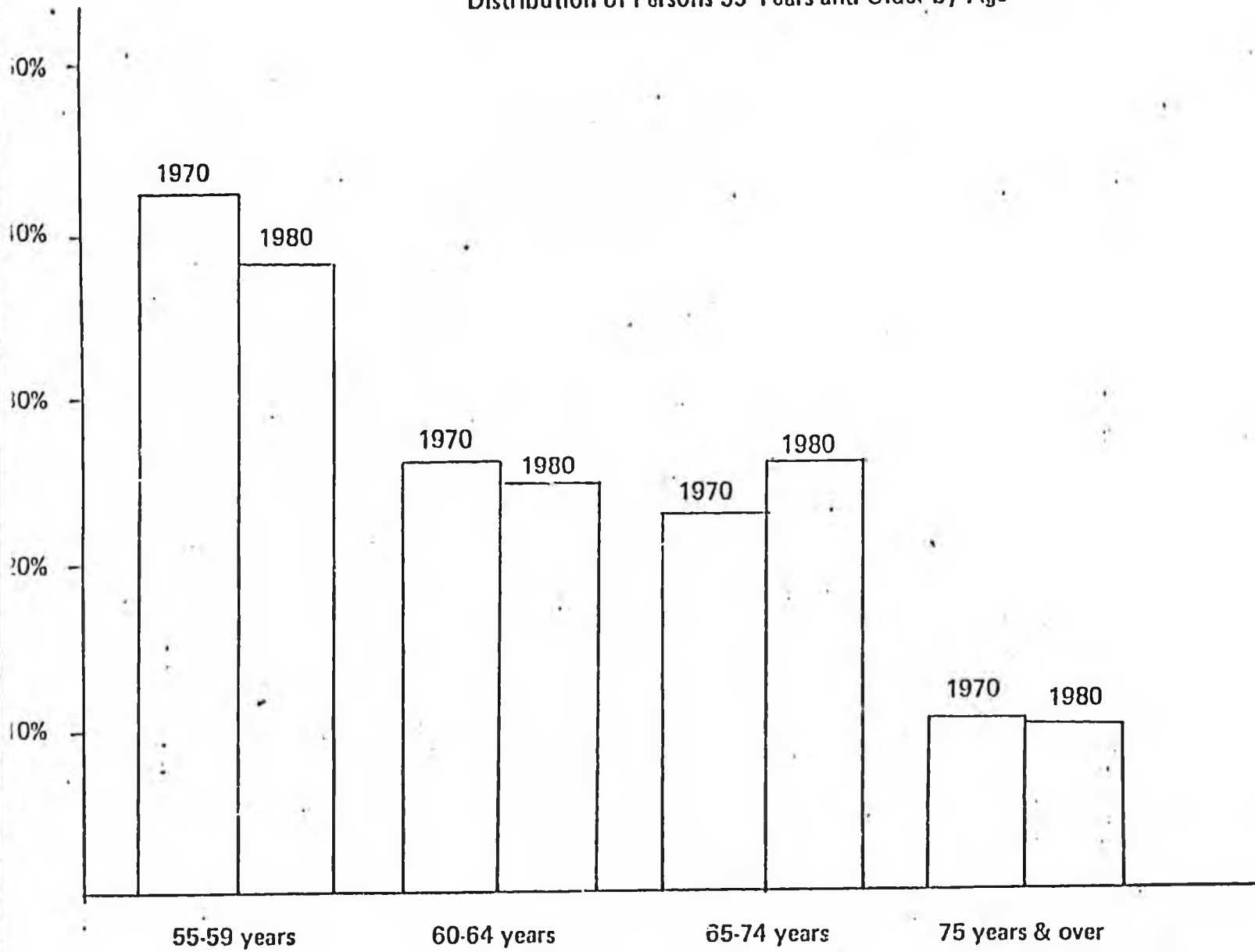


TABLE 3. NUMBER OF PERSONS 55 YEARS AND OLDER BY AGE AND SEX
STATE OF ALASKA
1970 AND 1980

	Total		55-59 Years'		60-64 Years		65-74 Years		75 + Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	11726	16839	4881	6777	2989	4303	2051	4278	1205	1481
Percent	100.0	100.0	41.6	40.2	25.5	25.6	22.6	25.4	10.3	8.8
<u>FEMALE</u>										
Number	9021	15421	3669	5840	2321	3793	2053	4034	970	1754
Percent	100.0	100.0	40.7	37.9	25.7	24.6	22.8	26.2	10.8	11.4
<u>TOTAL</u>										
Number	20747	32260	8550	12617	5310	8096	4704	8312	2183	3235
Percent	100.0	100.0	41.2	39.1	25.6	25.1	22.7	25.8	10.5	10.0

TABLE 4. NUMBER OF PERSONS 65 YEARS AND OLDER BY RACE
STATE OF ALASKA
1970 AND 1980

	Total		White		Black		Other*	
	1970	1980	1970	1980	1970	1980	1970	1980
Alaska	6887	11547	4653	8137	109	214	2125	3196
Aleutian Islands	66	107	16	12	1	0	49	95
Anchorage Borough	1729	3520	1455	3067	68	141	206	312
Bethel Census Div.	239	431	15	13	5	0	219	418
Bristol Bay Borough	26	25	20	12	0	0	6	13
Dillingham Census Div.	117	169	24	23	0	NA	93	146
Fairbanks North Star	573	1276	509	1074	20	57	44	145
Haines Borough	74	78	33	65	0	NA	41	13
Junesau Borough	512	771	411	636	4	2	97	133
Kenai Peninsula Borough	470	827	404	747	4	2	62	78
Ketchikan Gateway Bor.	515	642	426	523	3	1	86	118
Kobuk Census Division	157	249	10	15	0	NA	147	234
Kodiak Island Borough	210	255	114	141	3	5	93	109
Matanuska-Susitna Bor.	308	730	295	700	0	0	13	30
Nome Census Division	225	339	42	42	0	0	183	297
North Slope Borough	95	148	6	8	0	NA	89	140
Prince of Wales	129	151	43	51	0	NA	86	100
Sitka Borough	360	361	274	271	1	2	85	88
Skagway-Yakutat	190	192	106	93	0	NA	84	99
Southeast Fairbanks	24	142	22	86	0	2	2	54
Valdez-Cordova Census D.	189	295	133	208	0	1	56	86
Wade Hampton Census Div.	103	178	9	4	0	NA	94	174
Wrangell-Petersburg	259	353	194	272	0	NA	65	81
Yukon-Koyukuk Census D.	240	308	57	74	0	0	183	234
Total	6810	11547	4618	8137	109	213	2083	3197

*Includes Alaska Natives, Asians, and Pacific Islanders

Notes: (1) 1970 Census Division totals may not equal Alaska totals due to reporting changes.

(2) NA denotes "not available" due to census suppression to ensure confidentiality.

TABLE 5. PERCENT DISTRIBUTION OF PERSONS 65 YEARS AND OLDER BY RACE
STATE OF ALASKA
1970 AND 1980

	Total		White		Black		Other*	
	1970	1980	1970	1980	1970	1980	1970	1980
Alaska	6887	11547	67.6%	70.5%	1.6%	1.9%	30.9%	27.7%
Aleutian Islands	66	107	24.2	11.2	1.5	0.	74.2	88.8
Anchorage Borough	1729	3520	84.2	87.1	3.9	4.0	11.9	8.9
Bethel Census Division	239	431	6.3	3.0	2.1	0.	91.6	97.0
Briston Bay Borough	26	25	76.9	48.0	0.	0.	23.1	52.0
Dillingham Census Div.	117	169	20.5	13.6	0.	NA	79.5	86.4
Fairbanks North Star	573	1276	88.8	84.2	3.5	4.5	7.7	11.4
Haines Borough	74	78	44.6	83.3	0.	NA	55.4	16.7
Juneau Borough	512	771	80.3	82.5	0.8	0.3	18.9	17.3
Kenai Peninsula Borough	470	827	86.0	90.3	0.9	0.2	13.2	9.4
Ketchikan Gateway Bor.	515	642	82.7	81.5	0.6	0.2	16.7	18.4
Kobuk Census Division	157	249	6.4	6.0	0.	NA	93.6	94.0
Kodiak Island Borough	210	255	54.3	55.3	1.4	2.0	44.3	42.7
Matanuska-Susitna Bor.	308	730	95.8	95.9	0.	0.	4.2	4.1
Nome Census Borough	225	339	18.7	12.4	0.	0.	81.3	87.6
North Slope Borough	95	148	6.3	5.4	0.	NA	93.7	94.6
Prince of Wales	129	151	33.3	33.8	0.	NA	66.7	66.2
Sitka Borough	360	361	76.1	75.1	0.3	0.6	23.6	24.4
Skagway-Yakutat	190	192	55.8	48.4	0.	NA	44.2	51.6
Southeast Fairbanks	24	142	91.7	60.6	0.	1.4	8.3	38.0
Valdez-Cordova Census D.	189	295	70.4	70.5	0.	0.3	29.6	29.2
Wade Hampton Census Div.	103	178	8.7	2.2	0.	NA	91.3	97.8
Wrangell-Petersburg	259	353	74.9	77.1	0.	NA	25.1	22.9
Yukon-Koyukuk Census D.	240	308	23.8	24.0	0.	0.	76.3	76.0

*Includes Alaska Natives, Asians, and Pacific Islanders

Note: NA denotes "not available" due to census suppression to ensure confidentiality.

TABLE 6. NUMBER OF PERSONS 65 YEARS AND OVER
 BY TYPE OF LIVING ARRANGEMENT
 STATE OF ALASKA
 1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	2288	33.2	4243	36.7
Spouse	987	14.3	2116	18.3
Relative	1225	17.8	1200	10.4
Nonrelative	215	3.1	243	2.1
Total	4715	68.5	7802	67.6
<u>LIVING ALONE</u>				
Males	997	14.5	1250	10.8
Females	702	10.2	1716	14.9
Total	1699	24.7	2966	25.7
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	340	4.9	706	6.1
Other	133	1.9	73	0.6
Total	473	6.9	779	6.7
<u>GRAND TOTAL</u>	6887	100.0	11547	100.0

Figure 2 .

Distribution of Persons 65 Years and Older
by Type of Living Arrangements

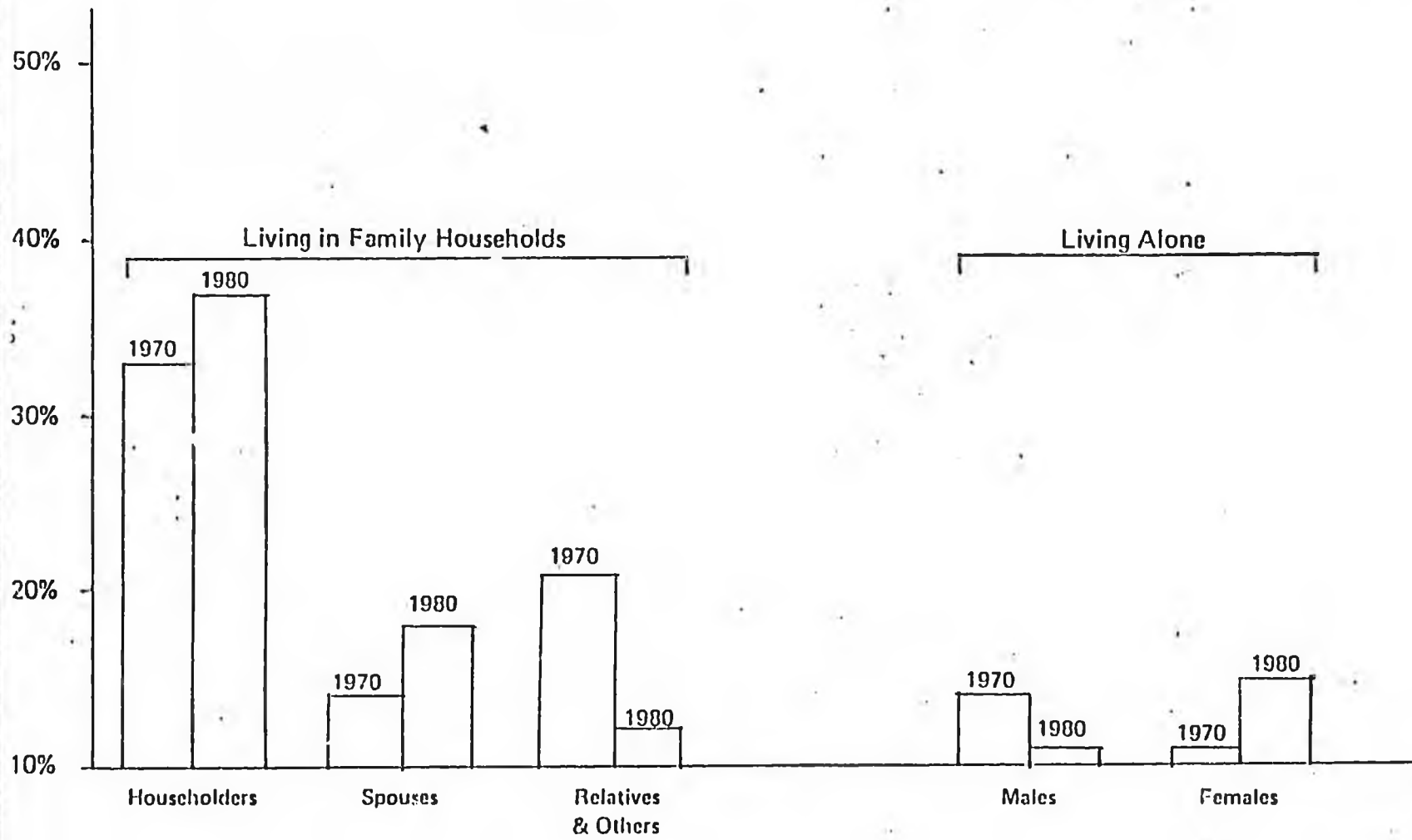


TABLE 7. HOUSEHOLDERS 65 YEARS AND OLDER
BY HOUSING TENURE STATUS
STATE OF ALASKA
1980

	Total	Percent	Homeowners		Renters	
			Number	Percent	Number	Percent
Alaska	9272	100.0	7209	77.8	2063	22.2
Aleutian Islands	73	100.0	66	90.4	7	9.6
Anchorage Borough	2789	100.0	2054	73.6	735	26.4
Bethel Census Division	337	100.0	294	87.2	43	12.8
Bristow Bay Borough	24	100.0	19	79.2	5	20.8
Dillingham Census Div.	127	100.0	119	93.7	8	6.3
Fairbanks North Star	1049	100.0	764	72.8	285	27.2
Haines Borough	64	100.0	51	79.7	13	20.3
Juneau Borough	698	100.0	508	73.8	180	26.2
Kenai Peninsula Borough	680	100.0	547	80.4	133	19.6
Ketchikan Gateway Bor.	518	100.0	399	77.0	119	23.0
Kobuk Census Division	179	100.0	164	91.6	15	8.4
Kodiak Island Borough	226	100.0	169	74.8	57	25.2
Matanuska-Susitna Bor.	472	100.0	395	83.7	77	16.3
Nome Census Division	314	100.0	235	74.8	79	25.2
North Slope Borough	123	100.0	96	78.0	27	22.0
Prince of Wales	118	100.0	101	85.6	17	14.4
Sitka Borough	232	100.0	165	71.1	67	28.9
Skagway-Yakutat	159	100.0	131	82.4	28	17.6
Southeast Fairbanks	112	100.0	93	83.0	19	17.0
Valdez-Cordova Census D.	253	100.0	208	79.1	55	20.9
Wade Hampton Census Div.	138	100.0	134	97.1	4	2.9
Wrangell-Petersburg	309	100.0	254	82.2	55	17.8
Yukon-Koyukuk Census D.	278	100.0	243	87.4	35	12.6

TABLE 8. PERSONS 65 YEARS AND OVER BY POVERTY STATUS
STATE OF ALASKA
1969 AND 1979

	1969		1979		<u>Above Poverty Status</u>				<u>Below Poverty Status</u>			
	Total	Percent	Total	Percent	1969		1979		1969		1979	
					Number	Percent	Number	Percent	Number	Percent	Number	Percent
Alaska	6172	100	10448	100	4179	78	8966	87	1453	22	1482	13
Aleutian Islands	16	100	103	100	3	19	67	65	13	71	36	35
Anchorage	1713	100	3200	100	1487	87	2932	92	226	13	268	8
Bethel Census Div.	253	100	423	100	37	34	302	71	166	66	121	29
Bristol Bay Borough	15	100	20	100	8	53	14	70	7	47	6	30
Dillingham Census Div.	125	100	164	100	69	53	91	55	56	45	73	45
Fairbanks North Star	534	100	1020	100	450	84	931	91	840	16	89	9
Haines Borough	47	100	75	100	27	6	65	87	29	94	10	13
Juneau Borough	485	100	730	100	417	86	670	92	68	14	60	8
Kenai Peninsula Borough	417	100	802	100	346	83	721	90	71	17	81	10
Ketchikan Gateway Bor.	505	100	546	100	379	75	462	85	126	25	94	15
Kobuk Census Division	148	100	244	100	104	70	173	71	44	30	71	29
Kodiak Island Borough	191	100	255	100	130	68	233	91	61	32	22	9
Matanuska-Susitna Bor.	302	100	633	100	219	72	556	88	83	20	77	12
Nome Census Division	225	100	318	100	144	64	207	65	81	36	111	35
North Slope Borough	151	100	150	100	101	67	119	79	50	33	31	21
Prince of Wales	80	100	151	100	73	91	129	85	7	9	22	15
Sitka Borough	199	100	245	100	146	73	219	89	53	27	26	11
Skagway-Yakutat	177	100	186	100	89	50	162	87	80	50	24	13
Southeast Fairbanks	59	100	110	100	50	85	92	84	9	15	18	16
Valdez-Cordova Census D.	77	100	262	100	59	77	196	75	18	23	66	25
Wade Hampton Census Div.	0	100	177	100	0	0	93	53	0	0	84	47
Wrangell-Petersburg	259	100	335	100	200	77	320	96	59	23	15	4
Yukon-Koyukuk Census D.	194	100	299	100	131	68	212	71	63	32	87	29

Figure 3

Distribution of Persons 65 Years and Older by Poverty Status

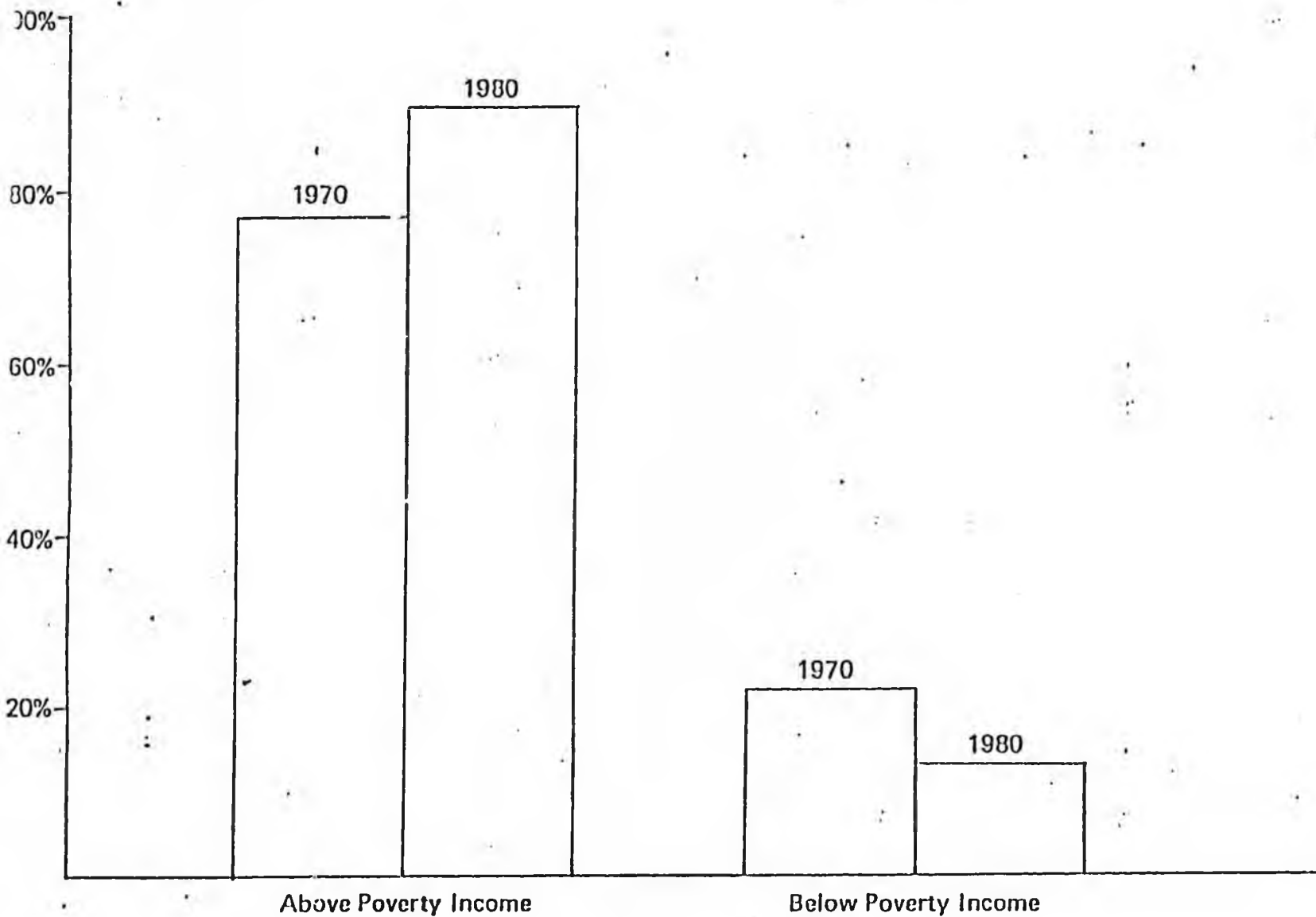


TABLE 10. NATIVE PERSONS 65 YEARS AND OLDER
 BY CENSUS DIVISION
 STATE OF ALASKA
 1980

	Number	Percent
Alaska	2881	100.0
Aleutian Islands	92	3.2
Anchorage Borough	194	6.7
Bethel Census Division	418	14.5
Bristol Bay Borough	13	0.5
Dillingham Census Div.	145	5.0
Fairbanks North Star	117	4.1
Haines Borough	12	0.4
Juneau Borough	77	2.7
Kenai Peninsula Borough	67	2.3
Ketchikan Gateway Bor.	93	3.2
Kobuk Census Division	234	8.1
Kodiak Island Borough	87	3.0
Matanuska-Susitna Bor.	26	0.9
Nome Census Division	297	10.3
North Slope Borough	140	4.9
Prince of Wales	98	3.4
Sitka Borough	77	2.7
Skagway-Yakutat	94	3.3
Southeast Fairbanks	54	1.9
Valdez-Cordova Census D.	73	2.5
Wade Hampton Census Div.	174	6.0
Wrangell-Petersburg	70	2.4
Yukon-Koyukuk Census D.	229	7.9

CENSUS AREA DATA TABLES

TABLE 11. PERSONS 55 YEARS AND OVER BY AGE AND SEX
ALEUTIAN ISLANDS CENSUS AREA
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	190	200	93	97	50	48	36	43	11	12
Percent	100.0	100.0	48.9	48.5	26.3	24.0	18.9	21.5	5.8	6.0
<u>FEMALE</u>										
Number	92	132	43	47	30	33	10	43	9	9
Percent	100.0	100.0	35.6	35.6	32.6	25.0	10.9	32.6	9.8	6.8
<u>TOTAL</u>										
Number	282	332	136	144	80	81	46	86	20	21
Percent	100.0	100.0	48.2	43.4	28.4	24.4	16.3	25.9	7.1	6.3

TABLE 12. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
ALEUTIAN ISLANDS CENSUS AREA
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	23	34.8	49	45.8
Spouse	2	3.0	15	14.0
Relative	13	19.7	21	19.6
Nonrelative	1	1.5	1	0.9
Total	39	59.1	86	80.4
<u>LIVING ALONE</u>				
Males	12	18.2	8	7.5
Females	2	3.0	9	8.4
Total	14	21.2	17	15.9
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0	0	0
Other	13	19.7	4	3.7
Total	13	19.7	4	3.7
<u>TOTAL</u>	66	100.0	107	100.0

TABLE 13. PERSONS 55 YEARS AND OVER BY AGE AND SEX
ANCHORAGE BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	3453	5912	1662	2746	901	1623	607	1195	283	355
Percent	100.0	100.0	48.1	46.4	26.1	27.4	17.6	20.2	8.2	6.0
<u>FEMALE</u>										
Number	3012	6026	1353	2609	820	1447	578	1428	261	542
Percent	100.0	100.0	44.9	43.3	27.2	24.0	19.2	23.7	8.7	9.0
<u>TOTAL</u>										
Number	6465	11945	3015	5355	1721	3070	1185	2623	544	897
Percent	100.0	100.0	46.6	44.8	26.6	25.7	18.3	22.0	8.4	7.5

TABLE 14. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
ANCHORAGE BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	472	27.3	1057	30.0
Spouse	253	14.6	630	17.9
Relative	456	26.4	507	14.4
Nonrelative	78	4.5	79	2.2
Total	1259	72.8	2273	64.6
<u>LIVING ALONE</u>				
Males	187	10.8	326	9.3
Females	191	11.0	671	19.1
Total	378	21.9	997	28.3
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	70	4.0	241	6.8
Other	22	1.3	9	0.3
Total	92	5.3	250	7.1
<u>TOTAL</u>	1729	100.0	3520	100.0

TABLE 15. PERSONS 55 YEARS AND OVER BY AGE AND SEX
 BETHEL CENSUS DIVISION
 1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	347	540	134	169	68	136	83	173	62	62
Percent	100.0	100.0	38.6	31.3	19.6	25.2	23.9	32.0	17.9	11.5
<u>FEMALE</u>										
Number	252	427	93	114	65	117	66	141	28	55
Percent	100.0	100.0	36.9	26.7	25.8	27.4	26.2	33.0	11.1	12.9
<u>TOTAL</u>										
Number	599	967	227	283	133	253	149	314	90	117
Percent	100.0	100.0	37.9	29.3	22.2	26.2	24.9	32.5	15.0	12.1

TABLE 16. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
 BETHEL CENSUS DIVISION
 1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	117	49.0	243	56.4
Spouse	22	9.2	75	17.4
Relative	67	28.0	58	13.5
Nonrelative	6	2.5	3	0.7
Total	212	88.7	379	87.9
<u>LIVING ALONE</u>				
Males	10	4.2	29	6.7
Females	16	6.7	22	5.1
Total	26	10.9	51	11.8
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	1	0.4	1	0.2
Total	1	0.4	1	0.2
<u>TOTAL</u>	239	100.0	431	100.0

TABLE 17. PERSONS 55 YEARS AND OVER BY AGE AND SEX
BRISTOL BAY BOROUGH
1970 AND 1980

	Total.		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	40	37	14	13	11	11	13	9	2	4
Percent	100.0	100.0	35.0	35.1	27.5	29.7	32.5	24.3	5.0	10.8
<u>FEMALE</u>										
Number	25	29	6	6	8	11	8	8	3	4
Percent	100.0	100.0	24.0	20.7	32.0	37.9	32.0	27.6	12.0	13.8
<u>TOTAL</u>										
Number	65	66	20	19	19	22	21	17	5	8
Percent	100.0	100.0	30.8	28.8	29.2	33.3	32.3	25.8	7.7	12.1

TABLE 18. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
BRISTOL BAY BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	2	34.6	13	52.0
Spouse	3	11.5	3	12.0
Relative	2	7.7	2	8.0
Nonrelative	2	7.7	1	4.0
Total	16	61.5	19	76.0
<u>LIVING ALONE</u>				
Males	7	26.9	3	12.0
Females	3	11.5	3	12.0
Total	10	38.5	6	24.0
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	0	0.0	0	0.0
Total	0	0.0	0	0.0
<u>TOTAL</u>	26	100.0	25	100.0

TABLE 19. PERSONS 55 YEARS AND OVER BY AGE AND SEX
DILLINGHAM CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	205	227	68	74	59	46	65	68	13	39
Percent	100.0	100.0	33.2	32.6	28.8	20.3	31.7	30.0	6.3	17.2
<u>FEMALE</u>										
Number	118	178	46	66	33	50	22	48	17	14
Percent	100.0	100.0	39.0	37.1	28.0	28.1	18.6	27.0	14.4	7.9
<u>TOTAL</u>										
Number	323	405	114	140	92	96	87	116	30	53
Percent	100.0	100.0	35.3	34.6	28.5	23.7	26.9	28.6	9.3	13.1

TABLE 20. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
DILLINGHAM CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	62	53.0	98	58.0
Spouse	13	11.1	31	18.3
Relative	12	10.3	17	10.1
Nonrelative	8	6.8	2	1.2
Total	95	81.2	148	87.6
<u>LIVING ALONE</u>				
Males	11	9.4	9	5.3
Females	10	8.5	12	7.1
Total	21	17.9	21	12.4
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	1	0.9	0	0.0
Total	1	0.9	0	0.0
<u>TOTAL</u>	117	100.0	169	100.0

TABLE 21. PERSONS 55 YEARS AND OVER BY AGE AND SEX
FAIRBANKS NORTH STAR BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	1248	2009	599	817	340	541	219	480	90	171
Percent	100.0	100.0	48.0	40.7	27.2	26.9	17.5	23.9	7.2	8.5
<u>FEMALE</u>										
Number	932	1742	432	669	236	448	178	434	86	191
Percent	100.0	100.0	46.4	38.4	25.3	25.7	19.1	24.9	9.2	11.0
<u>TOTAL</u>										
Number	2180	3751	1031	1486	576	989	397	914	176	362
Percent	100.0	100.0	47.3	39.6	26.4	26.4	18.2	24.4	8.1	9.7

TABLE 22. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
FAIRBANKS NORTH STAR BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	145	25.3	394	30.9
Spouse	74	12.9	211	16.5
Relative	109	19.0	122	9.6
Nonrelative	23	4.0	35	2.8
Total	351	61.3	763	59.8
<u>LIVING ALONE</u>				
Males	92	16.1	173	13.6
Females	53	9.2	197	15.4
Total	145	25.3	370	29.0
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	54	9.4	140	11.0
Other	23	4.0	3	0.2
Total	77	13.4	143	11.2
<u>TOTAL</u>	573	100.0	1276	100.0

TABLE 23. PERSONS 55 YEARS AND OVER BY AGE AND SEX
HAINES BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	108	120	54	42	24	35	24	38	6	5
Percent	100.0	100.0	50.0	35.0	22.2	29.2	22.2	31.7	5.6	4.2
<u>FEMALE</u>										
Number	92	103	27	38	21	30	26	29	18	6
Percent	100.0	100.0	29.3	36.9	22.8	29.1	28.3	28.2	19.6	5.8
<u>TOTAL</u>										
Number	200	223	81	80	45	65	50	67	24	11
Percent	100.0	100.0	40.5	35.9	22.5	29.1	25.0	30.0	12.0	4.9

TABLE 24. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
HAINES BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	20	27.0	36	46.2
Spouse	13	17.6	22	28.2
Relative	9	12.2	5	6.4
Nonrelative	2	2.7	0	0.0
Total	44	59.5	63	80.8
<u>LIVING ALONE</u>				
Males	9	12.2	5	6.4
Females	3	4.1	10	12.8
Total	12	16.2	15	19.2
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	18	24.3	0	0.0
Other	0	0.0	0	0.0
Total	18	24.3	0	0.0
<u>TOTAL</u>	74	100.0	78	100.0

TABLE 25. PERSONS 55 YEARS AND OVER BY AGE AND SEX
 JUNEAU BOROUGH
 1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	804	944	326	365	219	225	186	274	73	80
Percent	100.0	100.0	40.5	38.7	27.2	23.8	23.1	29.0	9.1	8.5
<u>FEMALE</u>										
Number	706	1046	262	351	191	278	177	283	76	134
Percent	100.0	100.0	37.1	33.6	27.1	26.6	25.1	27.1	10.8	12.8
<u>TOTAL</u>										
Number	1510	1990	588	716	410	503	363	557	149	214
Percent	100.0	100.0	38.9	36.0	27.2	25.3	24.0	28.0	9.9	10.8

TABLE 26. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
 JUNEAU BOROUGH
 1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	165	32.2	260	34.8
Spouse	87	17.0	145	18.8
Relative	95	18.6	76	9.9
Nonrelative	8	1.6	22	2.9
Total	355	69.3	511	66.3
<u>LIVING ALONE</u>				
Males	73	14.3	69	8.9
Females	79	15.4	171	22.2
Total	152	29.7	240	31.1
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	5	1.0	20	2.6
Other	0	0.0	0	0.0
Total	5	1.0	20	2.6
<u>TOTAL</u>	512	100.0	771	100.0

TABLE 27. PERSONS 55 YEARS AND OVER BY AGE AND SEX
KENAI PENINSULA BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	838	1297	345	486	209	355	158	375	86	81
Percent	100.0	100.0	41.2	37.5	24.9	27.4	23.6	28.9	10.3	6.2
<u>FEMALE</u>										
Number	538	1068	212	399	140	298	141	258	45	113
Percent	100.0	100.0	39.4	37.4	26.0	27.9	26.2	24.2	8.4	10.6
<u>TOTAL</u>										
Number	1376	2365	557	885	349	653	339	633	131	194
Percent	100.0	100.0	40.5	37.4	25.4	27.6	24.6	26.8	9.5	8.2

TABLE 28. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
KENAI PENINSULA BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	148	31.5	293	35.4
Spouse	65	13.8	167	20.2
Relative	84	17.9	69	8.3
Nonrelative	12	2.6	13	1.6
Total	309	65.7	542	65.5
<u>LIVING ALONE</u>				
Males	104	22.1	142	17.2
Females	40	8.5	112	13.5
Total	144	30.6	254	30.7
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	13	2.8	31	3.7
Other	4	0.9	0	0.0
Total	17	3.6	31	3.7
<u>TOTAL</u>	470	100.0	827	100.0

TABLE 29. PERSONS 55 YEARS AND OVER BY AGE AND SEX
KETCHIKAN GATEWAY BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	670	764	226	275	168	175	193	229	83	85
Percent	100.0	100.0	33.7	36.0	25.1	22.9	28.8	30.0	12.4	11.1
<u>FEMALE</u>										
Number	569	737	195	236	135	173	159	198	80	130
Percent	100.0	100.0	34.3	32.0	23.7	23.5	27.9	26.9	14.1	17.6
<u>TOTAL</u>										
Number	1239	1501	421	511	303	348	352	427	163	215
Percent	100.0	100.0	34.0	34.0	24.5	23.2	28.4	28.4	13.2	14.3

TABLE 30. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
KETCHIKAN GATEWAY BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	169	32.8	221	34.4
Spouse	83	16.1	123	19.2
Relative	55	10.7	31	4.8
Nonrelative	13	2.5	6	0.9
Total	320	62.1	381	59.3
<u>LIVING ALONE</u>				
Males	80	15.5	73	11.4
Females	45	16.5	105	16.4
Total	165	32.0	178	27.7
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	27	5.2	75	11.7
Other	3	0.6	8	1.2
Total	30	5.8	83	12.9
<u>TOTAL</u>	515	100.0	642	100.0

TABLE 31. PERSONS 55 YEARS AND OVER BY AGE AND SEX
KOBUK CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	181	242	65	63	38	52	54	87	24	40
Percent	100.0	100.0	35.9	26.0	21.0	21.5	29.8	36.0	13.3	16.5
<u>FEMALE</u>										
Number	175	228	55	64	41	42	45	79	34	43
Percent	100.0	100.0	31.4	28.1	23.4	18.4	25.7	34.6	19.4	18.9
<u>TOTAL</u>										
Number	356	470	120	127	79	94	99	166	58	83
Percent	100.0	100.0	33.7	27.0	22.2	20.0	27.8	35.3	16.3	17.7

TABLE 32. PERSONS OVER 55 YEARS BY TYPE OF LIVING ARRANGEMENT
KOBUK CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	80	51.0	126	50.6
Spouse	23	14.6	50	20.1
Relative	31	19.7	25	10.0
Nonrelative	2	1.3	1	0.4
Total	136	86.6	202	81.1
<u>LIVING ALONE</u>				
Males	8	5.1	21	8.4
Females	10	6.4	17	6.6
Total	18	11.5	38	15.3
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	3	1.9	9	3.6
Total	3	1.9	9	3.6
<u>TOTAL</u>	157	100.0	249	100.0

TABLE 33. PERSONS 55 YEARS AND OVER BY AGE AND SEX
KODIAK ISLAND BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	367	432	143	185	91	113	93	95	40	39
Percent	100.0	100.0	39.0	42.8	24.8	26.2	25.3	22.0	10.9	9.0
<u>FEMALE</u>										
Number	237	311	100	106	60	84	55	84	22	37
Percent	100.0	100.0	42.2	34.1	25.3	27.0	23.2	27.0	9.3	11.9
<u>TOTAL</u>										
Number	604	743	243	291	151	197	148	179	62	76
Percent	100.0	100.0	40.2	39.2	25.0	26.5	24.5	24.1	10.3	10.2

TABLE 34. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
KODIAK ISLAND BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	72	34.3	88	34.5
Spouse	33	15.7	45	17.6
Relative	36	17.1	25	9.8
Nonrelative	6	2.9	9	3.5
Total	147	70.0	167	65.5
<u>LIVING ALONE</u>				
Males	38	18.1	40	15.7
Females	17	8.1	41	16.1
Total	55	26.2	81	31.8
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	1	0.5	5	2.0
Other	7	3.3	2	0.8
Total	8	3.8	7	2.7
<u>TOTAL</u>	210	100.0	255	100.0

TABLE 35. PERSONS 55 YEARS AND OVER BY AGE AND SEX
MATANUSKA-SUSITNA BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	485	953	168	345	116	237	143	276	58	95
Percent	100.0	100.0	34.6	36.2	23.9	24.9	29.5	29.0	12.0	10.0
<u>FEMALE</u>										
Number	333	840	131	276	95	205	80	243	27	116
Percent	100.0	100.0	39.3	32.9	28.5	24.4	24.0	28.9	8.1	13.8
<u>TOTAL</u>										
Number	818	1793	299	621	211	442	223	519	85	211
Percent	100.0	100.0	36.6	34.6	25.8	24.7	27.3	28.9	10.4	11.8

TABLE 36. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
MATANUSKA-SUSITNA BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	91	29.5	246	33.7
Spouse	47	15.3	155	21.4
Relative	34	11.0	63	8.6
Nonrelative	11	3.6	15	2.1
Total	183	59.4	480	65.8
<u>LIVING ALONE</u>				
Males	71	23.1	68	9.3
Females	27	8.8	81	11.1
Total	98	31.8	149	20.4
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	2	0.6	100	13.7
Other	25	8.1	1	0.1
Total	27	8.8	101	13.8
<u>TOTAL</u>	308	100.0	730	100.0

TABLE 37. PERSONS 55 YEARS AND OVER BY AGE AND SEX
 HOME CENSUS DIVISION
 1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	310	375	117	125	68	73	92	130	33	47
Percent	100.0	100.0	37.7	33.3	21.9	19.5	29.7	34.7	10.6	12.5
<u>FEMALE</u>										
Number	259	314	100	87	59	65	73	119	27	43
Percent	100.0	100.0	38.6	27.7	22.8	20.7	28.2	37.9	10.4	13.7
<u>TOTAL</u>										
Number	569	689	217	212	127	138	165	249	60	90
Percent	100.0	100.0	38.1	30.8	22.3	20.0	29.0	36.1	10.5	13.1

TABLE 38. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
 HOME CENSUS DIVISION
 1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	113	50.2	179	52.8
Spouse	22	9.8	64	18.9
Relative	40	17.8	33	9.7
Nonrelative	4	1.8	5	1.5
Total	179	79.6	281	82.9
<u>LIVING ALONE</u>				
Males	24	10.7	33	9.7
Females	12	5.3	23	6.8
Total	36	16.0	56	16.5
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	10	4.4	2	0.6
Total	10	4.4	2	0.6
<u>TOTAL</u>	225	100.0	339	100.0

TABLE 39. PERSONS 55 YEARS AND OVER BY AGE AND SEX
NORTH SLOPE BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	140	187	45	67	38	39	40	62	17	19
Percent	100.0	100.0	32.1	35.8	27.0	20.9	28.6	33.2	12.1	10.2
<u>FEMALE</u>										
Number	102	144	42	45	22	32	23	52	15	15
Percent	100.0	100.0	41.2	31.3	21.6	22.2	22.5	36.1	14.7	10.4
<u>TOTAL</u>										
Number	242	331	87	112	60	71	63	114	32	34
Percent	100.0	100.0	36.0	33.8	24.8	21.5	26.0	34.4	13.2	10.3

TABLE 40. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
NORTH SLOPE BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	52	54.7	84	56.8
Spouse	13	13.7	34	23.0
Relative	16	16.8	15	10.1
Nonrelative	0	0.0	1	0.7
Total	81	85.3	134	90.5
<u>LIVING ALONE</u>				
Males	3	3.2	5	3.4
Females	7	7.4	7	4.7
Total	10	10.5	12	8.1
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	1	1.1	0	0.0
Other	3	3.2	2	1.4
Total	4	4.2	2	1.4
<u>TOTAL</u>	95	100.0	148	100.0

TABLE 41. PERSONS 55 YEARS AND OVER BY AGE AND SEX
PRINCE OF WALES-OUTER KETCHIKAN
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
MALE										
Number	240	214	97	77	71	54	48	55	24	28
Percent	100.0	100.0	40.4	36.0	29.6	25.2	20.0	25.7	10.0	13.1
FEMALE										
Number	142	162	47	53	38	41	41	43	16	25
Percent	100.0	100.0	33.1	32.7	26.8	25.3	28.9	26.5	11.3	15.4
TOTAL										
Number	382	376	144	130	109	95	89	98	40	53
Percent	100.0	100.0	37.7	34.6	28.5	25.3	22.3	26.1	10.5	14.1

TABLE 42. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
PRINCE OF WALES-OUTER KETCHIKAN
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
LIVING IN FAMILY HOUSEHOLD				
Householder	56	43.4	64	42.4
Spouse	26	20.2	31	20.5
Relative	23	17.8	13	8.6
Nonrelative	1	0.8	1	0.7
Total	106	82.2	109	72.2
LIVING ALONE				
Males	12	9.3	20	13.2
Females	10	7.8	17	11.3
Total	22	17.1	37	24.5
LIVING IN GROUP QUARTERS				
Inmate of Institution	0	0.0	5	3.3
Other	1	0.8	0	0.0
Total	1	0.8	5	3.3
TOTAL	129	100.0	151	100.0

TABLE 43. PERSONS 55 YEARS AND OVER BY AGE AND SEX
SITKA BOROUGH
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	404	405	120	137	83	91	108	97	93	80
Percent	100.0	100.0	29.7	33.8	20.5	22.5	26.7	24.0	23.0	19.8
<u>FEMALE</u>										
Number	344	384	119	128	66	72	94	103	65	81
Percent	100.0	100.0	34.6	33.3	19.2	18.8	27.3	26.8	18.9	21.1
<u>TOTAL</u>										
Number	748	789	239	265	149	163	202	200	158	161
Percent	100.0	100.0	32.0	33.6	19.9	20.7	27.0	25.3	21.1	20.4

TABLE 44. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
SITKA BOROUGH
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	79	21.9	100	27.7
Spouse	46	12.8	57	15.8
Relative	27	7.5	28	7.8
Nonrelative	9	2.5	24	6.6
Total	161	44.7	209	57.9
<u>LIVING ALONE</u>				
Males	27	7.5	20	5.5
Females	30	8.3	45	12.5
Total	57	15.8	65	18.0
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	141	39.2	64	17.7
Other	1	0.3	23	6.4
Total	142	39.4	87	24.1
<u>TOTAL</u>	360	100.0	361	100.0

TABLE 45. PERSONS 55 YEARS AND OVER BY AGE AND SEX
SKAGWAY-YAKUTAT-ANGOON CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	240	218	72	73	50	44	84	64	34	37
Percent	100.0	100.0	30.0	33.5	20.8	20.2	35.0	29.4	14.2	17.0
<u>FEMALE</u>										
Number	148	197	50	62	26	44	51	62	21	29
Percent	100.0	100.0	33.8	31.5	17.6	22.3	34.5	31.5	14.2	14.7
<u>TOTAL</u>										
Number	388	415	122	135	76	88	135	126	55	66
Percent	100.0	100.0	31.4	32.5	19.6	21.2	34.8	30.4	14.2	15.9

TABLE 46. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
SKAGWAY-YAKUTAT-ANGOON CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	76	40.0	85	44.3
Spouse	34	17.9	45	23.4
Relative	17	8.9	12	6.3
Nonrelative	4	2.1	4	2.1
Total	131	68.9	146	76.0
<u>LIVING ALONE</u>				
Males	42	22.1	20	10.4
Females	16	8.4	26	13.5
Total	58	30.5	46	24.0
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	1	0.5	0	0.0
Total	1	0.5	0	0.0
<u>TOTAL</u>	190	100.0	192	100.0

TABLE 47. PERSONS 55 YEARS AND OVER BY AGE AND SEX
SOUTHEAST FAIRBANKS CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	63	201	37	77	11	49	11	50	4	25
Percent	100.0	100.0	58.7	38.3	17.5	24.4	17.5	24.9	6.3	12.4
<u>FEMALE</u>										
Number	38	162	15	62	14	33	7	45	2	22
Percent	100.0	100.0	39.5	38.3	36.8	20.4	18.4	27.8	5.3	13.6
<u>TOTAL</u>										
Number	101	363	52	139	25	82	18	95	6	47
Percent	100.0	100.0	51.5	38.3	24.8	22.6	17.8	26.2	5.9	12.9

TABLE 48. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
SOUTHEAST FAIRBANKS CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	14	58.3	69	48.6
Spouse	7	29.2	28	19.7
Relative	0	0.0	14	9.9
Nonrelative	0	0.0	5	3.5
Total	21	87.5	116	81.7
<u>LIVING ALONE</u>				
	2	8.3	18	12.7
	1	4.2	6	4.2
	3	12.5	24	16.9
<u>GROUP QUARTERS</u>				
Institution	0	0.0	0	0.0
	0	0.0	2	1.4
Total	0	0.0	2	1.4
<u>TOTAL</u>	24	100.0	142	100.0

Handwritten notes:
 1970
 1980
 1979
 1980
 1979
 1980
 1979
 1980

TABLE 49. PERSONS 55 YEARS AND OVER BY AGE AND SEX
VALDEZ-CORDOVA CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	373	458	142	174	107	113	86	123	38	48
Percent	100.0	100.0	38.1	38.0	28.7	24.7	23.1	26.9	10.2	10.5
<u>FEMALE</u>										
Number	211	349	88	145	58	80	43	89	22	35
Percent	100.0	100.0	41.7	41.5	27.5	22.9	20.4	25.5	10.4	10.0
<u>TOTAL</u>										
Number	584	807	230	319	165	193	129	212	60	83
Percent	100.0	100.0	39.4	39.5	28.3	23.9	22.1	26.3	10.3	10.3

TABLE 50. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
VALDEZ-CORDOVA CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	65	34.4	116	39.3
Spouse	22	11.6	45	15.3
Relative	10	5.3	25	8.5
Nor.relative	5	2.6	6	2.0
Total	102	54.0	192	65.1
<u>LIVING ALONE</u>				
Males	51	27.0	56	19.0
Females	24	12.7	36	12.2
Total	75	39.7	92	31.2
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	8	4.2	6	2.0
Other	4	2.1	5	1.7
Total	12	6.3	11	3.7
<u>TOTAL</u>	189	100.0	295	100.0

TABLE 51. PERSONS 55 YEARS AND OVER BY AGE AND SEX
WADE HAMPTON CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	149	251	54	96	37	47	41	80	17	28
Percent	100.0	100.0	36.2	38.2	24.8	18.7	27.5	31.9	11.4	11.2
<u>FEMALE</u>										
Number	114	179	41	67	28	42	30	50	15	20
Percent	100.0	100.0	36.0	37.4	24.6	23.5	26.3	27.9	13.2	11.2
<u>TOTAL</u>										
Number	263	430	95	163	65	89	71	130	32	48
Percent	100.0	100.0	36.1	37.9	24.7	20.7	27.0	30.2	12.2	11.2

TABLE 52. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
WADE HAMPTON CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	50	48.5	118	66.3
Spouse	13	12.6	31	17.4
Relative	18	17.5	12	6.7
Nonrelative	1	1.0	1	0.6
Total	82	79.6	162	91.0
<u>LIVING ALONE</u>				
Males	10	9.7	7	3.9
Females	5	4.9	9	5.1
Total	15	14.6	16	9.0
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	6	5.8	0	0.0
Total	6	5.8	0	0.0
<u>TOTAL</u>	103	100.0	178	100.0

TABLE 53. PERSONS 55 YEARS AND OVER BY AGE AND SEX
WRANGELL-PETERSBURG CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	354	435	119	139	93	104	96	143	45	49
Percent	100.0	100.0	33.6	32.0	26.3	23.9	27.1	32.9	13.0	11.3
<u>FEMALE</u>										
Number	273	371	91	113	65	97	73	101	44	60
Percent	100.0	100.0	33.3	30.5	23.8	26.1	26.7	27.2	16.1	16.2
<u>TOTAL</u>										
Number	627	806	210	252	158	201	169	244	90	109
Percent	100.0	100.0	33.5	31.3	25.2	24.9	27.0	30.3	14.4	13.5

TABLE 54. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
WRANGELL-PETERSBURG CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	88	34.0	150	42.5
Spouse	46	17.8	65	18.4
Relative	28	10.8	10	2.8
Nonrelative	10	3.9	5	1.4
Total	172	66.4	230	65.2
<u>LIVING ALONE</u>				
Males	51	19.7	43	12.2
Females	35	13.5	61	17.3
Total	86	33.2	104	29.5
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	19	5.4
Other	1	0.4	0	0.0
Total	1	0.4	19	5.4
<u>TOTAL</u>	259	100.0	353	100.0

TABLE 55. PERSONS 55 YEARS AND OVER BY AGE AND SEX
YUKON-KOYUKUK CENSUS DIVISION
1970 AND 1980

	Total		55-59 Years		60-64 Years		65-74 Years		75+ Years	
	1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
<u>MALE</u>										
Number	406	411	148	135	107	92	103	132	48	52
Percent	100.0	100.0	36.5	32.8	26.4	22.4	25.4	32.1	11.8	12.7
<u>FEMALE</u>										
Number	238	292	92	97	57	71	51	94	38	30
Percent	100.0	100.0	38.7	33.2	23.9	24.3	21.4	32.2	16.0	10.3
<u>TOTAL</u>										
Number	644	703	240	232	164	163	154	226	86	82
Percent	100.0	100.0	37.3	33.0	25.5	23.2	23.9	32.1	13.4	11.7

TABLE 56. PERSONS OVER 65 YEARS BY TYPE OF LIVING ARRANGEMENT
YUKON-KOYUKUK CENSUS DIVISION
1970 AND 1980

	1970		1980	
	Number	Percent	Number	Percent
<u>LIVING IN FAMILY HOUSEHOLD</u>				
Householder	95	39.6	146	47.4
Spouse	24	10.0	43	14.0
Relative	37	15.4	17	5.5
Nonrelative	8	3.3	3	1.0
Total	164	68.3	209	67.9
<u>LIVING ALONE</u>				
Males	52	21.7	62	20.1
Females	22	9.2	35	11.4
Total	74	30.8	97	31.5
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	0	0.0
Other	2	0.8	2	0.6
Total	2	0.8	2	0.6
<u>TOTAL</u>	240	100.0	308	100.0

MEMORANDUM

State of Alaska

TO: George Michael
Administrative Officer
Department of Administration

DATE: January 5, 1984
FILE NO:
TELEPHONE NO: 2173
SUBJECT: Longevity Payment Program

FROM: Vincent D. Wright *vdw*
Chief of Research
Department of Revenue

I am again sending you, at your request, an updated version of one potential source of funding for a longevity payment program. If 12.5 percent of distributable income (AS 37.13.140) plus interest is set aside for such a program, then the numbers in the table below are the result.

The numbers are based on our January 1984 forecast and thus subject to change since these forecasts are updated quarterly. I have assumed the same annualized eight percent rate of return that was adopted in previous letters to you on the subject. You should also be aware that the nominal eight percent rate of return works out to an effective rate of approximately half the nominal rate due to the fact that these distributable income monies accrue on a month-by-month basis. The eight percent nominal rate, at this point in time, could be judged as conservative.

I am not familiar with the latest thinking relative to a longevity program and have thus taken a general approach to the numbers realizing, of course, that there may be exceptions or peculiarities that may be advocated in proposing such a program.

If you have any questions, feel free to call.

VDW:jas

Attachment

cc: Robert D. Heath
Commissioner of Revenue

Bruce M. Botelho
Deputy Commissioner, Taxation

Expenditure Year
(millions of current dollars)

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90
Transfer (12.5% of prior FY's dis- tributable income)	37.4	48.9	60.5	68.4	75.9	85.6
Interest (at 8%)	<u>1.5</u>	<u>1.96</u>	<u>2.42</u>	<u>2.74</u>	<u>3.04</u>	<u>3.42</u>
Total	38.9	50.86	62.92	71.14	78.94	89.02

REPORT 3: PF INTEREST & DIVIDEND CALCULATIONS
(DEPT OF REVENUE, RESEARCH)

X.123
↓

	PFCO	PFOC	PFBAl	PFRTIP	PFBAN	PFIE	PFIDIS	PFDIE	PFDPMT	CYR	PFDA	PFBAR	PFBANR
81	384.60	900.00	1767.80	0.00	1767.80	149.59	90.88	122.12	0.00	80	1872.86	1872.86	1767.80
82	401.12	800.00	2968.92	0.00	2968.92	368.53	183.43	298.03	0.00	81	3299.29	3124.33	2811.48
83	419.65	400.00	3738.57	231.10	4019.67	471.34	255.41	332.36	478.13	82	4372.86	3966.45	3646.09
84	319.22	200.00	4538.89	190.63	4729.53	474.36	299.20	238.60	175.94	83	5195.31	4531.21	4124.97
85	319.59	0.00	5049.12	227.21	5276.32	492.67	391.30	254.17	185.91	84	5811.92	4827.63	4382.74
86	335.27	0.00	5611.59	308.64	5920.23	612.31	483.84	315.54	198.73	85	6517.57	5107.34	4639.24
87	374.06	0.00	6294.29	377.66	6671.94	686.55	547.45	351.66	246.41	86	7304.46	5399.97	4932.37
88	402.20	0.00	7074.14	424.45	7498.59	768.57	606.89	400.35	279.17	87	8171.77	5699.20	5229.70
89	463.60	0.00	7962.18	477.73	8439.91	860.53	684.12	449.53	309.80	88	9153.83	6022.76	5553.03
90	439.60	0.00	8879.50	532.77	9412.27	959.86	777.56	497.97	349.65	89	10164.50	6309.18	5842.27
91	411.09	0.00	9823.36	589.40	10412.76	1061.89	867.48	551.12	397.90	90	11203.74	6560.61	6097.43
92	413.44	0.00	10826.20	649.57	11475.77	1168.43	963.85	605.51	444.37	91	12303.68	6796.90	6339.54
93	402.20	0.00	11877.97	712.68	12590.64	1280.49	1066.24	662.59	494.21	92	13453.25	7011.28	6561.73
94	391.62	0.00	12982.27	778.94	13761.20	1397.66	1173.67	722.50	547.21	93	14655.79	7205.62	6765.83
95	372.78	0.00	14133.98	848.04	14982.01	1519.33	1285.66	785.40	602.86	94	15905.47	7377.44	6949.11
96	362.37	0.00	15344.38	920.66	16265.04	1647.27	1402.74	851.34	660.93	95	17213.74	7532.32	7117.19
97	375.26	0.00	16640.30	922.22	17562.52	1781.90	1525.43	922.04	721.69	96	18608.19	7681.61	7249.95
98	388.92	0.00	17951.43	991.11	18942.54	1925.39	1654.41	991.11	785.42	97	20095.29	7825.94	7377.01
99	393.63	0.00	19341.22	1064.87	20406.09	2078.17	1790.51	1064.87	852.48	98	21676.88	7964.04	7497.16
0	403.44	0.00	20809.53	1142.93	21952.46	2240.37	1934.62	1142.93	923.31	99	23353.37	8094.32	7608.77

REPORT 3: PF INTEREST & DIVIDEND CALCULATIONS

FY	CYR	PBASE	PNTINC	PHMIGR	POPCIV	DEPMLT	PERMLT	TMILT	POPTOT	CHILD	ADULT	POPG	PFAPPT	PFAPPA	PFCHLA
81	80	339.50	4.03	8.52	380.52	32.44	22.10	54.54	402.62	131.01	271.61	3.20	394.57	266.17	128.39
82	81	352.26	4.18	14.86	399.55	32.44	22.10	54.54	421.65	132.99	288.66	4.73	413.22	282.89	130.33
83	82	371.52	4.41	19.28	423.23	32.44	22.10	54.54	445.33	136.00	309.33	5.62	476.43	330.93	145.50
84	83	395.48	4.69	8.91	436.83	32.44	22.10	54.54	458.93	140.16	318.77	3.05	455.61	316.47	139.14
85	84	409.24	4.85	9.18	450.86	32.44	22.10	54.54	472.96	144.44	328.52	3.06	463.50	321.95	141.55
86	85	423.44	5.02	9.46	465.34	32.44	22.10	54.54	487.44	148.86	338.58	3.06	477.69	331.80	145.89
87	86	433.09	5.19	9.75	480.28	32.44	22.10	54.54	502.38	153.43	348.96	3.07	492.33	341.98	150.36
88	87	453.22	5.37	10.05	495.70	32.44	22.10	54.54	517.80	158.14	359.67	3.07	507.45	352.47	154.97
89	88	468.82	5.56	10.36	511.62	32.44	22.10	54.54	533.72	163.00	370.72	3.07	523.04	363.31	159.74
90	89	484.93	5.75	10.67	528.04	32.44	22.10	54.54	550.14	168.01	382.13	3.08	539.14	374.49	164.65
91	90	501.55	5.95	11.00	544.99	32.44	22.10	54.54	567.09	173.19	393.90	3.08	555.75	386.02	169.73
92	91	518.70	6.15	11.34	562.48	32.44	22.10	54.54	584.58	178.53	406.05	3.08	572.89	397.93	174.96
93	92	536.40	6.36	11.69	580.54	32.44	22.10	54.54	602.64	184.04	418.59	3.09	590.58	410.22	180.36
94	93	554.67	6.58	12.05	599.17	32.44	22.10	54.54	621.27	189.73	431.53	3.09	608.84	422.90	185.94
95	94	573.53	6.80	12.43	618.39	32.44	22.10	54.54	640.49	195.61	444.89	3.09	627.68	435.99	191.69
96	95	592.98	7.03	12.81	638.23	32.44	22.10	54.54	660.33	201.67	458.67	3.10	647.13	449.49	197.63
97	96	613.06	7.27	13.21	658.71	32.44	22.10	54.54	680.81	207.92	472.89	3.10	667.19	463.43	203.76
98	97	633.78	7.52	13.62	679.84	32.44	22.10	54.54	701.94	214.37	487.57	3.10	687.90	477.82	210.08
99	98	655.17	7.77	14.04	701.65	32.44	22.10	54.54	723.75	221.03	502.71	3.11	709.27	492.66	216.61
0	99	677.24	8.03	14.47	724.15	32.44	22.10	54.54	746.25	227.90	518.35	3.11	731.33	507.98	223.35

REPORT 3: PF INTEREST & DIVIDEND CALCULATIONS

FY	PFRTIP	PFDIE	PFUIA	UIAIE	UIABD	CPFUII	CUAIE	CPFUIA
81	0.00	122.12	122.12	0.00	-27.47	105.06	0.00	105.06
82	0.00	298.03	298.03	0.00	-72.72	330.37	0.00	330.37
83	231.10	332.36	101.26	31.10	-109.54	322.09	31.10	353.19
84	190.63	288.60	97.97	36.17	-21.53	400.23	65.56	465.79
85	227.21	254.17	26.96	42.85	0.00	427.19	108.41	535.60
86	308.64	315.54	6.90	54.85	0.00	434.09	163.25	597.34
87	377.66	351.66	-26.00	61.17	0.00	408.09	224.42	632.52

A M E N D M E N T #3

#3

Offered in the SENATE

By V.Fischer

TO: CSSB 347 (Finance)

Page 1, lines 6-7: Delete "authorizing the use of Alaska permanent fund income to pay longevity bonuses;"

Page 1, lines 8-9: Delete "and the permanent fund dividend distribution program"

Page 1, line 12 through page 2, line 3: Delete * Sections 1 and * Sec. 2. Renumber succeeding sections accordingly.

Page 3, lines 9-14: Delete * Sec. 5. Renumber succeeding sections accordingly.

Page 4, line 25: After "retirement;" insert "and".

Page 4, line 26 through Page 5, line 1: Delete all material.

Page 5, line 2: Delete "(5)" and insert "(4)".

A M E N D M E N T

#1

Offered in the SENATE

By V.Fischer

TO: CSSE 347 (Finance)

Page 1, lines 6-7: Delete "authorizing the use of Alaska permanent fund income to pay longevity bonuses;"

Page 1, lines 8-9: Delete "and the permanent fund dividend distribution program"

Page 1, line 12 through page 2, line 3: Delete * Sections 1 and * Sec. 2. Renumber succeeding sections accordingly.

Page 3, lines 9-14: Delete * Sec. 5. Renumber succeeding sections accordingly.

Page 4, line 25: After "retirement;" insert "and".

Page 4, line 26 through Page 5, line 1: Delete all material.

Page 5, line 2: Delete "(5)" and insert "(4)".

Page 5, after line 9: Insert a new bill section to read:

"* Sec. 7. AS 47.45 is repealed July 1, 1986."

Renumber succeeding section accordingly.

A M E N D M E N T

#2

Offered in the SENATE

By V.Fischer

TO: CSSB 347 (Finance)

Page 5, lines 10-16, delete all material and insert:

"* Sec. 10. Sections 3, 7, and 9 of this Act take effect on the date of a final decision by the Alaska Supreme Court that affirms the decision of the superior court in the case of Rodney Vest, et al v. Marian Schafer and State of Alaska, No. 1JU-82-1103 CIV, Superior Court for the State of Alaska, First Judicial District at Juneau, on the constitutionality of the Alaska longevity program, or on July 1, 1986, whichever date comes first."

Page 5, after line 16, insert a new bill section to read:

"* Sec. 11. Sections 1, 2, 4-6, and 8 of this Act take effect July 1, 1986."

BILL SHEFFIELD, GOVERNOR

REPLY TO:

1031 W 4th AVENUE
SUITE 200
ANCHORAGE, ALASKA 99501
PHONE: (907) 276-3550

1st NATIONAL CENTER
100 CUSHMAN ST.
SUITE 400
FAIRBANKS, ALASKA 99701
PHONE: (907) 452-1568

POUCH K - STATE CAPITOL
JUNEAU, ALASKA 99811
PHONE: (907) 65-3600

DEPARTMENT OF LAW

OFFICE OF THE ATTORNEY GENERAL

February 21, 1984

The Honorable Bill Ray
Alaska State Senate
Pouch V
Juneau, Alaska 99811

Re: Longevity Bonus Retroactivity

Dear Senator Ray:

You have asked our office for the legal implications of a section in a longevity bonus bill providing benefits retroactive to July 1, 1982. Our answer is that such a section is not legally required and will have little effect, if any, on the lawsuit.

When the state was sued, in the summer of 1982, on the constitutionality of the existing program, a three-way settlement agreement was entered into by this office, the Legislative Council, and Mr. Vest's attorneys. That agreement provided that the Legislative Council would use its best efforts to secure legislation during the 1983 session which would benefit all persons over the age of 65 equally, and which would be retroactive to July 1, 1982. Counsel for Vest agreed therein to give up all claim to benefits prior to 1982; the state agreed to provide benefits to Vest and his class back to that date. Thus last session, retroactive provision was necessary in order to settle the lawsuit.

The legislature did not, of course, pass any longevity legislation during the 1983 session, and as a result the lawsuit was not settled. The settlement agreements made in 1982, therefore, do not relate to the 1984 legislature. The inclusion of a retroactive section in legislation this year will not settle the litigation or foreclose Vest from seeking benefits back to 1972.

Counsel for Vest apparently believe that they still have a claim for retroactive benefits pending before the superior court. They have not yet moved on this claim. We do not believe that the inclusion or exclusion of a retroactive section in 1984 legislation will have any significant bearing on the outcome of this litigation, except to the extent that if one were included

Hon. Bill Ray
Alaska State Senate

February 22, 1984
Page 2

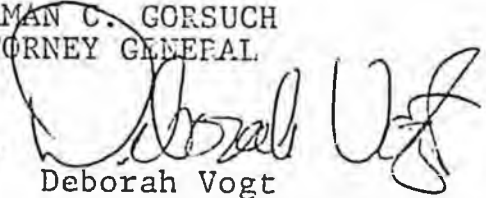
Vest would not have to litigate his claim for the included period (i.e. from July 1, 1982 to the present).

Please let us know if we can be of any further assistance.

Sincerely,

NORMAN C. GORSUCH
ATTORNEY GENERAL

By:


Deborah Vogt
Assistant Attorney General

DV:jf

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: February 27, 1984

REQUEST

Bill/Resolution No.: CSSB 347

Title: Permanent Fund/Longevity
Bonus

Sponsor: Ray

Requestor: Mulcahy

Date of Request: February 24, 1984

FISCAL DETAIL

Agency Affected: Administration

Program Category Affected: Social Services

BRU, Program or Subprogram(s) Affected:

Longevity Bonus Program

TABLE OF CONTENTS

Fiscal Note	Page 1 of 12
Fiscal Note Explanation Sheet	Page 2 of 12
Fiscal Note Analysis	Page 3 of 12
Analysis of Additional Costs	Page 4 of 12
Permanent Funds Available	Page 5 of 12
Costs of Program (By Year)	Page 6 of 12
Grants (Bonus) Budget Projections	Page 7 of 12
Existing Proposed FY 85 Budget	Page 8 of 12

Additional Information

Explanation Sheet Based on \$200 Bonus Payments	Page 9 of 12
Fiscal Note Analysis Based on \$200 Bonus Payments	Page 10 of 12
Analysis of Additional Costs Based on \$200 Bonus Payments	Page 11 of 12
Total Costs Based on \$200 Bonus Payments	Page 12 of 12

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: February 27, 1984
Page 1 of 12

REQUEST

Bill/Resolution No.: CSSB 347
Title: Permanent Fund/Longevity Bonus

FISCAL DETAIL

Agency Affected: Administration
Program Category Affected: Social Services

Sponsor: Ray
Requestor: Mulcahy
Date of Request: February 24, 1984

BRU, Program of Subprogram(s) Affected:
Longevity Bonus Program

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES		49.9	28.7	28.7	28.7	28.7
200 TRAVEL						
300 CONTRACTUAL		56.9	57.9	58.9	59.9	60.9
400 SUPPLIES		1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 GRANTS, CLAIMS, ETC		12,456.0	12,096.0	11,736.0	11,376.0	11,016.0
800 MISCELLANEOUS						
TOTAL OPERATING	0	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND		(26,335.7)	(33,116.4)	(35,275.4)	(37,434.4)	(39,593.4)
FEDERAL FUNDS						
OTHER (Permanent Fund)		38,900.0	45,300.0	47,100.0	48,900.0	50,700.0
TOTAL	0	12,564.3	12,183.6	11,824.6	11,465.6	11,106.6

POSITIONS:

FULL-TIME	0	1.0	1.0	1.0	1.0	1.0
PART-TIME	0	1.0	0	0	0	0
TEMPORARY	0	0	0	0	0	0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL: In FY 85 there would be an expenditure of \$38,900.0 in Permanent Fund Distributable Income and a reduction in the Longevity Bonus General Funds Budget of \$26,335.7. In succeeding years Permanent Funds would increase and General Funds would decrease.

ANALYSIS: Attach a separate page for any Analysis.

Prepared By: E. Louis Keller, Director
Division: Pioneers' Benefits

Phone: (907) 465-4400
Date: February 27, 1984

Approved by Commissioner: Lisa Rudd
Agency: DEPARTMENT OF ADMINISTRATION

Date: 2-28-84

Distribution (by Agency preparing fiscal note):

- Legislative Finance
- Legislative Sponsor
- Requestor
- Office of Management and Budget
- Impacted Agency(ies)

CSSB 347 .

Fiscal Note Explanation Sheet (FY 85 only)
 Prepared by Division of Pioneers' Benefits
 Department of Administration .
 February 27, 1984

Budget Categories: (Longevity Bonus Program)	Existing proposed budget (Governor) as follows: Column 1) FY 85 as proposed based on August 1983 projections of 11,208 recipients. Column 2) Adjustment based on February 1984 projections of 10,348 recipients. Column 3) Revised FY 85 proposed budget.			Additional cost of Longevity Bonus Program under CSSB 347 and by funding source (as shown on the fiscal note, page 1):			Reconciliation:		
	1) Totals (all G.F.*)	2) Adjustment**	3) Revised Totals	G.F.	P.F.°	Total	G.F.	P.F.	Total
100 Personal Services	175.6		175.6	49.9		49.9	225.5		225.5
200 Travel	4.0		4.0				4.0		4.0
300 Contractual	85.6		85.6	56.9		56.9	142.5		142.5
400 Supplies	3.5		3.5	1.5		1.5	5.0		5.0
500 Equipment	.7		.7				.7		.7
700 Grants	32,551.5	(1,507.5)	31,044.0	(26,335.7)°	12,456.0	12,456.0	4,600.0	38,900.0	43,500.0
Totals	32,820.9	(1,507.5)	31,313.4	108.3	12,456.0	12,564.3	4,977.7	38,900.0	43,877.7+

* G.F. = General Fund.

**Based on revised estimate of 10,348 recipients in FY 85.

° P.F. = Permanent Fund.

+ \$26,335.7 is a reduction in expenditures from the General Fund and is not carried into the totals of this column (for information only).

- Total cost of Longevity Bonus Program should CSSB 347 become law (FY 85 only).

CSSB 347
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

This fiscal note was requested to be prepared using the following assumptions:

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications.

There will be approximately 10,348 persons on the Longevity Bonus program by July 1, 1984. Therefore, it is assumed, as requested using the February 22 information, that an additional 4,152 persons will be enrolled on the program in FY 85 under the bill.

- c. The amount of the bonus would be \$250 per month. According to calculations of Permanent Fund Distributable Income issued by the Department of Revenue in January of 1984, only \$38.9 million would be available for credit to the Longevity Bonus account in FY 85. This amount would fund only 12,967 persons, rather than 14,500. Therefore, the additional \$4.6 million needed to fund 14,500 persons would have to be obtained from another source.
- d. No retroactive payments would be paid.
- e. The program would continue to grow at the rate of approximately 50 per month, after the initial group of persons are enrolled who would be made eligible by the one-year residency requirement.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) would be paid from the General Fund. Bonus payments would be paid from the Longevity Bonus Account established from earnings of the Permanent Fund, except for the additional \$4.6 million needed, which would be paid from the General Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on July 1, 1984.

CSSB 347
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 49,862
Clerk V, PFT	\$28,710
Clerk II, PPT (2 positions, 6 months)	21,152
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	56,950
Commodities	1,500
Office supplies and file cabinets for application and recipient files	
Grants	
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 12 x \$250)	12,456,000
Total additional funds required for FY 85	\$12,564,312

November 9, 1984

Permanent Funds Available for
Longevity Bonus Grants
(CSSB 347)

		<u>Earnings</u>		<u>Interest</u>		
FY 85	-	\$37,400,000	+	\$1,500,000	=	\$38,900,000
FY 86	-	\$48,900,000	+	\$1,960,000	=	\$50,860,000
FY 87	-	\$60,500,000	+	\$2,420,000	=	\$62,920,000
FY 88	-	\$68,400,000	+	\$2,740,000	=	\$71,140,000
FY 89	-	\$75,900,000	+	\$3,040,000	=	\$78,940,000
FY 90	-	\$85,600,000	+	\$3,420,000	=	\$89,020,000
FY 91	-	\$97,200,000	+	\$3,888,000	=	\$101,088,000
FY 92	-	\$108,435,000	+	\$4,337,400	=	\$112,772,400
FY 93	-	\$120,481,000	+	\$4,819,250	=	\$125,300,250
FY 94	-	\$133,280,000	+	\$5,331,200	=	\$138,611,200

February 24, 1984

Total Longevity Bonus Program Costs (Actual)

(CSSB 347)

FY 85	Administration (reg.)	\$ 269,400	GF
	Additional Administration	108,312	GF
	Grants (14,500 x 12 x \$250)	38,900,000	PF
		4,600,000	GF
	Total	<u>\$43,877,712</u>	
FY 86	Administration	\$ 269,400	GF
	Additional Administration	87,600	GF
	Grants (15,100 x 12 x \$250)	45,300,000	PF
	Total	<u>\$45,657,000</u>	
FY 87	Administration	\$ 269,400	GF
	Additional Administration	88,600	GF
	Grants (15,700 x 12 x \$250)	47,100,000	PF
	Total	<u>\$47,458,000</u>	
FY 88	Administration	\$ 269,400	GF
	Additional Administration	89,600	GF
	Grants (16,300 x 12 x \$250)	48,900,000	PF
	Total	<u>\$49,259,000</u>	
FY 89	Administration	\$ 269,400	GF
	Additional Administration	90,600	GF
	Grants (16,900 x 12 x \$250)	50,700,000	PF
	Total	<u>\$51,060,000</u>	

Grants Budget
If Longevity Bonus Program Is Unchanged
(based on growth of 50 per month
over present enrollment)

FY 85	10,348 persons @ \$250/mo.	=	\$31,044.0
FY 86	11,068 persons @ \$250/mo.	=	33,204.0
FY 87	11,788 persons @ \$250/mo.	=	35,364.0
FY 88	12,508 persons @ \$250/mo.	=	37,524.0
FY 89	13,228 persons @ \$250/mo.	=	39,684.0
FY 90	13,948 persons @ \$250/mo.	=	41,844.0
FY 91	14,668 persons @ \$250/mo.	=	44,004.0
FY 92	15,388 persons @ \$250/mo.	=	46,164.0
FY 93	16,108 persons @ \$250/mo.	=	48,324.0
FY 94	16,828 persons @ \$250/mo.	=	50,484.0

03-02-04-00-00 (02-22-3-07-00-00)

STATE OF ALASKA -- COMPONENT_BUDGET_SUMMARY

07:57

1/03/84

AGENCY: DEPARTMENT OF ADMINISTRATION
CATEGORY: SOCIAL SERVICESPROGRAM: LONGEVITY BONUS
SUB-PROGRAM: LONGEVITY BONUS

EXPENDITURES & FUNDING	83 AUTH	83 FINAL	83 ACT	84 AUTH	ADJ BASE	85 SL 1	85 SL 2	85 SL 3	85 SL 4	GOVERNOR
01 PERS. SERV.	156.6	156.6	169.4	159.4	164.7	175.6	161.0	161.0	175.6	175.6
02 TRAVEL	4.4	4.4	1.7	4.0	4.0	4.0	3.8	3.8	4.0	4.0
03 CONTRACTUAL	106.0	106.0	84.6	81.1	81.1	81.1	77.0	77.0	85.6	85.6
04 SUPPLIES	3.5	3.5	1.0	3.5	3.5	3.5	3.3	3.3	3.5	3.5
05 EQUIPMENT			.4						.7	.7
06 LANDS/BLDGS										
07 GRAHTS, CLMS	27944.0	27944.0	27504.5	30211.5	30211.5	29749.5	26963.8	27468.1	32551.5	32551.5
08 MISC.										
** TOTAL EXPEND	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
09 I-A TRANSFER	26.1	26.1	26.1	2.1		24.7	23.4	23.4	26.2	26.2
FED. RECEIPT										
**GF + MATCH	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
G. F. MATCH GENERAL FUND PGM RECEIPTS I/A RECEIPTS OTHER FUNDS	28214.5	28214.5	27761.6	30459.5	30464.8	30013.7	27208.9	27713.2	32820.9	32820.9
15 FULL-TIME	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
16 PART-TIME										
17 TEMPORARY										

000042A

Informational Only:
 BASED ON \$200 PER
 MONTH LONGEVITY BONUS

CSSB 347
 Fiscal Note Explanation Sheet (FY 85 only)
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Budget Categories: (Longevity Bonus Program)	Adjusted proposed FY 85 budget			Additional cost of Longevity Bonus Program under CSSB 347 by funding source			Reconciliation: Total cost of Program		
	Total (All G.F.)*	Adjustment**	Revised Total	G.F.	P.F.°	Total	G.F.	P.F.	Total
100 Personal Services	175.6		175.6	49.9		49.9	225.5		225.5
200 Travel	4.0		4.0				4.0		4.0
300 Contractual	85.6		85.6	56.9		56.9	142.5		142.5
400 Supplies	3.5		3.5	1.5		1.5	5.0		5.0
500 Equipment	.7		.7				.7		.7
700 Grants	32,551.5	(1,507.5)	31,044.0	(30,935.7)°	3,756.0	3,756.0		34,800.0	34,800.0
Totals	32,820.9	(1,507.5)	31,313.4	108.3	3,756.0	3,864.3	377.7	34,800.0	35,177.7

* G.F. = General Fund.

**Based on revised estimate of 10,348 recipients in FY 85.

° P.F. = Permanent Fund.

°°\$30,935.7 is a reduction in expenditures from the General Fund and is not carried into the totals of this column (for information only).

* Total cost of Longevity Bonus Program should CSSB 347 become law (FY 85 only) based on payments of \$200 per month.

CSSB 347
Fiscal Note Analysis
Prepared By Division of Pioneers' Benefits
Department of Administration
February 27, 1984

This bill would increase the number of persons eligible for the Longevity Bonus Program.

This fiscal note was requested to be prepared using the following assumptions:

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year would be eligible.
- b. On February 22, 1984, the Senate Finance Committee received information from the Department of Revenue that there are 14,500 Alaskans over age 65, based on verified 1983 Permanent Fund applications.

There will be approximately 10,348 persons on the Longevity Bonus program by July 1, 1984. Therefore, it is assumed, as requested using the February 22 information, that an additional 4,152 persons will be enrolled on the program in FY 85 under the bill.

- c. The amount of the bonus would be \$200 per month. According to calculations of Permanent Fund Distributable Income issued by the Department of Revenue in January of 1984, \$38.9 million would be available for credit to the Longevity Bonus account in FY 85. At \$200 per month only \$34.8 million would be required, leaving an unspent balance of \$4.1 million in FY 85.
- d. No retroactive payments would be paid.
- e. The program would continue to grow at the rate of approximately 50 per month, after the initial group of persons are enrolled who would be made eligible by the one-year residency requirement.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) would be paid from the General Fund. Bonus payments would be paid from the Longevity Bonus Account established from earnings of the Permanent Fund.
- g. An increase in the Longevity Bonus staff would be needed to process the flood of new applications.
- h. The Act would become effective on July 1, 1984.

CSSB 347
 Fiscal Note Analysis
 Prepared By Division of Pioneers' Benefits
 Department of Administration
 February 27, 1984

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 49,862
Clerk V, PFT	\$28,710
Clerk II, PPT (2 positions, 6 months)	21,152
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	56,950
Commodities	1,500
Office supplies and file cabinets for application and recipient files	
Grants	9,964,800
Additional funds needed for Bonus payments to additional persons who will be eligible (4,152 x 12 x \$200	
Difference in cost per month for those already enrolled on July 1, 1984 (\$50 x 12 x 10,348)	(6,208,800)
Total additional funds required for FY 85	\$ 3,864,312

February 27, 1984

Total Longevity Bonus Program Costs (Actual)
(CSSB 347)

FY 85	Administration (reg.) Additional Administration Grants (14,500 x 12 x \$200) Total	\$ 269,400 108,312 34,800,000 <u>\$35,177,712</u>	GF GF PF
FY 86	Administration Additional Administration Grants (15,100 x 12 x \$200) Total	\$ 269,400 87,600 36,240,000 <u>\$36,597,000</u>	GF GF PF
FY 87	Administration Additional Administration Grants (15,700 x 12 x \$200) Total	\$ 269,400 88,600 37,680,000 <u>\$38,038,000</u>	GF GF PF
FY 88	Administration Additional Administration Grants (16,300 x 12 x \$200) Total	\$ 269,400 89,600 39,120,000 <u>\$39,479,000</u>	GF GF PF
FY 89	Administration Additional Administration Grants (16,900 x 12 x \$200) Total	\$ 269,400 90,600 40,560,000 <u>\$40,920,000</u>	GF GF PF

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: 2/3/84

Page 1 of 3

REQUEST

Bill/Resolution No.: C.S.S.B. 347
Title: Permanent Fund/Longevity Bonus
Sponsor: Ray
Requestor:
Date of Request:

FISCAL DETAIL

Agency Affected: Administration
Program Category Affected: Social Services
BRU, Program of Subprogram(s) Affected:
Longevity Bonus Program

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES	0	85.2	28.7	28.7	28.7	28.7
200 TRAVEL	0					
300 CONTRACTUAL	0	85.0	85.5	86.0	86.5	87.0
400 COMMODITIES	0	1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT	0					
600 LAND & STRUCTURES	0					
700 GRANTS, CLAIMS, ETC	0	26,312.0	9,363.8	10,275.4	11,290.6	12,642.0
TOTAL OPERATING	0	26,483.7	9,479.0	10,391.1	11,406.8	12,758.7
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND	0	(12,416.3)	(33,088.8)	(35,248.3)	(37,407.8)	(39,567.3)
FEDERAL FUNDS						
OTHER (Permanent Fund)	0	38,900.0	42,567.8	45,639.4	48,814.6	52,326.0
TOTAL	0	26,483.7	9,479.0	10,391.1	11,406.8	12,758.7

POSITIONS:

FULL-TIME	0	1.0	1.0	1.0	1.0	1.0
PART-TIME	0	2.7	0	0	0	0
TEMPORARY						
TOTAL	0	3.7	1.0	1.0	1.0	1.0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL:

Permanent Fund

ANALYSIS: Attach a separate page for any Analysis.

Prepared By: E. Louis Keller, Director
Division: Pioneers' Benefits

Phone: 465-4400
Date: February 3, 1984

Approved by Commissioner: Lisa Rudd
Agency: DEPARTMENT OF ADMINISTRATION

Date: 2/10/84

Distribution (by Agency preparing fiscal note):
Legislative Finance
Legislative Sponsor
Requestor
Office of Management and Budget
Impacted Agency(ies)

12/1/83

8/7D2/0203-18/1

C.S.S.B. 347
Fiscal Note Analysis
Prepared by Division of Pioneers' Benefits
Department of Administration
February 3, 1984

This bill will increase the number of persons eligible for the Longevity Bonus Program and decrease the amount of the monthly bonus payments.

Assumptions

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year will be eligible.
- b. It is believed that there are approximately 16,500 persons now living in Alaska who will qualify under new eligibility requirements, and that there will be approximately 10,348 persons on the program by July 1, 1984. Therefore, it is assumed that an additional 6,152 persons will be enrolled on the program in FY 85 under the bill.
- c. The amount of the bonus will be \$200 per month, escalated 3% per year beginning in FY 86, or an amount equal to $8 \frac{1}{3}\%$ of the amount credited to the longevity bonus account for the previous fiscal year divided by the number of qualified recipients, whichever is less. According to this formula the amount of the monthly bonus is estimated to be:

FY 85 - \$196
FY 86 - \$206
FY 87 - \$212
FY 88 - \$218
FY 89 - \$225
- d. The program will continue to grow at the rate of approximately 60 per month, after the initial group of persons are enrolled who will be made eligible by the one-year residency requirement.
- e. Retroactive payments in the amount of \$250 per month will be made to approximately 6,152 persons who would have been eligible on July 1, 1983.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) will be paid from the General Fund. All bonus payments will be paid from the Longevity Bonus Account established from earnings of the Permanent Fund, except for retroactive payments, which will be paid from State General Funds.
- g. An increase in the Longevity Bonus staff will be needed to process the flood of new applications.
- h. The Act will become effective on July 1, 1984.

Senate Bill 347
 Fiscal Note Analysis
 Prepared by Division of Pioneers' Benefits
 Department of Administration
 February 3, 1984

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 85,196
Clerk V, PFT	\$18,710
Clerk II, PPT (4 positions, 8 months)	56,486
Contractual Services	
Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	85,000
Commodities	
Office supplies and file cabinets for application and recipient files	1,500
Grants	
Additional funds needed for Bonus payments to additional persons who will be eligible (6,152 x 12 x \$196)	14,503,803
Difference in cost per month for those already enrolled on July 1, 1984; (\$54 x 12 x 10,348)	(6,647,812)
Retroactive payments to those who would have been eligible as of July 1, 1983 (\$250 x 12 x 6,152)	18,456,000
Total additional funds required for FY 85	<hr style="width: 100%;"/> \$26,483,687

1.	POSITION TITLE Clerk V				RANGE/STEP 11B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP.	
2.	TYPE OF POSITION PFT	STAFF MONTHS 12	RP NUMBER	PCN NUMBER	BRU PRIORITY 1	LOCATION Juneau	ELECTION DISTRICT 4	LEG.			
3.	CONTINUATION LEVEL				JUSTIFICATION						
4.	TYPE OF EXPENDITURE			AMOUNT							
	1		2		3						
	PERSONAL SERVICES										
5.	Salary	1,914/mo.			22,968						
6.	Benefits			1,454							
7.	Supplemental Benefits			1,408							
8.	Fixed Benefits			2,880							
9.	TOTAL PERSONAL SERVICES		01	28,710							
10.	Travel			02							
11.	Contractual			03							
12.	Commodities			04							
13.	Equipment			05							
14.	Other										
15.	TOTAL COST				28,710						
	RECEIPT CODE	FUNDING SOURCE									
16.		Federal Receipts 1002									
17.		G.F. Match 1003									
18.	100	General Funds 1004		28,710							
19.		I-A Receipts 1005									
20.		Program Receipts 1028									
21.		Other									
FOR B&M USE ONLY											
4A KEY NUMBER. _____											

The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. A Clerk V position is required to supervise four PPT Clerk II positions, who will be required to process the volume of applications. In addition, the Clerk V will be responsible for calculation of any retroactive benefits which may be due.

At the end of eight months, it is expected that the receipt of applications will level off and the Clerk V position will then be required to assist with actions necessary for continuing eligibility of increased number of recipients, and added volume of data input.

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II			RANGE/STEP 7B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 2	LOCATION Juneau	ELECTION DISTRICT 4	LEG.	
3.	CONTINUATION LEVEL			ADDITION	JUSTIFICATION				
4.	TYPE OF EXPENDITURE			AMOUNT	<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Four (4) permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>				
	1	2	3						
	PERSONAL SERVICES								
5.	Salary	1,510/MO.	12,080						
6.	Benefits		2,042						
7.	Supplemental Benefits								
8.	Fixed Benefits								
9.	TOTAL PERSONAL SERVICES	01	14,122						
10.	Travel	02							
11.	Contractual	03							
12.	Commodities	04							
13.	Equipment	05							
14.	Other								
15.	TOTAL COST		14,122						
	RECEIPT CODE	FUNDING SOURCE							
16.		Federal Receipts 1002							
17.		G.F. Match 1003							
18.	100	General Funds 1004		14,122					
19.		I-A Receipts 1005							
20.		Program Receipts 1028							
21.		Other							
FOR B&M USE ONLY									
4A KEY NUMBER _____									

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP.
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 3	LOCATION Juneau	ELECTION DISTRICT 4	LEC.		
3.	CONTINUATION LEVEL				JUSTIFICATION					
4.	TYPE OF EXPENDITURE			AMOUNT	<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Four (4) permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>					
	1	2	3							
	PERSONAL SERVICES									
5.	Salary	1,510/mo.	12,080							
6.	Benefits		2,042							
7.	Supplemental Benefits									
8.	Fixed Benefits									
9.	TOTAL PERSONAL SERVICES	01	14,122							
10.	Travel	02								
11.	Contractual	03								
12.	Commodities	04								
13.	Equipment	05								
14.	Other									
15.	TOTAL COST		14,122							
	RECEIPT CODE	FUNDING SOURCE								
16.		Federal Receipts	1002							
17.		G.F. Match	1003							
18.	100	General Funds	1004	14,122						
19.		I-A Receipts	1005							
20.		Program Receipts	1028							
21.		Other								
FOR B&M USE ONLY										
4A KEY NUMBER										

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP.
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 4	LOCATION Juneau	ELECTION DISTRICT 4	LEG.		
3.	CONTINUATION LEVEL				JUSTIFICATION					
4.	TYPE OF EXPENDITURE			AMOUNT	<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Four (4) permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>					
	1	2	3							
	PERSONAL SERVICES									
5.	Salary	1,510/mo.	12,080							
6.	Benefits		2,042							
7.	Supplemental Benefits									
8.	Fixed Benefits									
9.	TOTAL PERSONAL SERVICES	01	14,122							
10.	Travel	02								
11.	Contractual	03								
12.	Commodities	04								
13.	Equipment	05								
14.	Other									
15.	TOTAL COST		14,122							
	RECEIPT CODE	FUNDING SOURCE								
16.		Federal Receipts 1002								
17.		G.F. Match 1003								
18.	100	General Funds 1004		14,122						
19.		I-A Receipts 1005								
20.		Program Receipts 1028								
21.		Other								
FOR B&M USE ONLY										
4A KEY NUMBER _____										

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12 PAGE/LINE	COV.	APPROV.	DISAPP.		
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 5	LOCATION Juneau	ELECTION DISTRICT 4	LEG.				
3.	CONTINUATION LEVEL				JUSTIFICATION							
4.	TYPE OF EXPENDITURE				<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Four (4) permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>							
	1		2								3	
	PERSONAL SERVICES											
5.	Salary	1,510/MO.	12,080									
6.	Benefits		2,042									
7.	Supplemental Benefits											
8.	Fixed Benefits											
9.	TOTAL PERSONAL SERVICES		01	14,122								
10.	Travel		02									
11.	Contractual		03									
12.	Commodities		04									
13.	Equipment		05									
14.	Other											
15.	TOTAL COST			14,122								
	RECEIPT CODE	FUNDING SOURCE										
16.		Federal Receipts 1002										
17.		G.F. Match 1003										
18.	100	General Funds 1004		14,122								
19.		I-A Receipts 1005										
20.		Program Receipts 1028										
21.		Other										
FOR B&M USE ONLY												
4A KEY NUMBER _____												

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Agr.
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: 2/1/84

Page 1 of 3

REQUEST

Bill/Resolution No.: S.B. 347
Title: Permanent Fund/Longevity Bonus
Sponsor: Ray
Requestor:
Date of Request:

FISCAL DETAIL

Agency Affected: Administration
Program Category Affected: Social Services
BRU, Program of Subprogram(s) Affected:
Longevity Bonus Program

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES	0	85.2	28.7	28.7	28.7	28.7
200 TRAVEL	0					
300 CONTRACTUAL	0	85.0	85.5	86.0	86.5	87.0
400 COMMODITIES	0	1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT	0					
600 LAND & STRUCTURES	0					
700 GRANTS, CLAIMS, ETC	0	7,856.0	9,363.8	10,275.4	11,290.6	12,642.0
TOTAL OPERATING	0	8,027.7	9,479.0	10,391.1	11,406.8	12,758.7
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND	0	(30,872.3)	(33,088.8)	(35,248.3)	(37,407.8)	(39,567.3)
FEDERAL FUNDS						
OTHER (Permanent Fund)	0	38,900.0	42,567.8	45,639.4	48,814.6	52,326.0
TOTAL	0	8,027.7	9,479.0	10,391.1	11,406.8	12,758.7

POSITIONS:

FULL-TIME	0	1.0	1.0	1.0	1.0	1.0
PART-TIME	0	2.7	0	0	0	0
TEMPORARY						
TOTAL	0	3.7	1.0	1.0	1.0	1.0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL:

Permanent Fund

ANALYSIS: Attach a separate page for any Analysis.

Prepared By: *E. Louis Keller*
E. Louis Keller, Director
Division: Pioneers' Benefits

Phone: 465-4400
Date: February 1, 1984

Approved by Commissioner: *Lisa Rudd*
Lisa Rudd
Agency: DEPARTMENT OF ADMINISTRATION

Date: 2/1/84

Distribution (by Agency preparing fiscal note):
Legislative Finance
Legislative Sponsor
Requestor
Office of Management and Budget
Impacted Agency(ies)

Senate Bill 347
Fiscal Note Analysis
Prepared by Division of Pioneers' Benefits
Department of Administration
February 1, 1984

This bill will increase the number of persons eligible for the Longevity Bonus Program and decrease the amount of the monthly bonus payments.

Assumptions

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year will be eligible.
- b. It is believed that there are approximately 16,500 persons now living in Alaska who will qualify under new eligibility requirements, and that there will be approximately 10,348 persons on the program by July 1, 1984. Therefore, it is assumed that an additional 6,152 persons will be enrolled on the program in FY 85 under the bill.
- c. The amount of the bonus for FY 85 will only be \$103 per month, considering that \$18,456,000 in retroactive payments must be subtracted from the amount to be placed in the Longevity Bonus Account for that year. Bonuses for FY 86-89 would be as follows:

FY 86 - \$206
FY 87 - \$212
FY 88 - \$218
FY 89 - \$225

- d. The program will continue to grow at the rate of approximately 60 per month, after the initial group of persons are enrolled who will be made eligible by the one-year residency requirement.
- e. Retroactive payments in the amount of \$250 per month will be made to approximately 6,152 persons who would have been eligible on July 1, 1983.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) will be paid from the General Fund. All bonus payments will be paid from the Longevity Bonus Account established from earnings of the Permanent Fund.
- g. An increase in the Longevity Bonus staff will be needed to process the flood of new applications.
- h. The Act will become effective on July 1, 1984.

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 85,196
Clerk V, PFT	\$28,710
Clerk II, PPT (4 positions, 8 months)	56,486

Senate Bill 347
 Fiscal Note Analysis
 Prepared by Division of Pioneers' Benefits
 Department of Administration
 February 1, 1984

(Continued)	<u>Annual Cost</u>
Contractual Services Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	85,000
Commodities Office supplies and file cabinets for application and recipient files	1,500
Grants Additional funds needed for Bonus payments to additional persons who will be eligible (6,152 x 12 x \$103)	7,603,872
Difference in cost per month for those already enrolled on July 1, 1984; (\$147 x 12 x 10,348)	(18,203,872)
Retroactive payments to those who would have been eligible as of July 1, 1983 (\$250 x 12 x 6,152)	18,456,000
Total additional funds required for FY 85	<hr style="width: 100%;"/> \$8,027,696

1.	POSITION TITLE Clerk V				RANGE/STEP 11B	BARG. UNIT G	FORM 12 PAGE/LINE	COV.	APPRDV.	DISAPP.	
2.	TYPE OF POSITION PFT	STAFF MONTHS 12	RP NUMBER	PCN NUMBER	BRU PRIORITY 1	LOCATION Juneau	ELECTION DISTRICT 4	LEC.			
3.	CONTINUATION LEVEL				JUSTIFICATION						
4.	TYPE OF EXPENDITURE				<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. A Clerk V position is required to supervise four PPT Clerk II positions, who will be required to process the volume of applications. In addition, the Clerk V will be responsible for calculation of any retroactive benefits which may be due.</p> <p>At the end of eight months, it is expected that the receipt of applications will level off and the Clerk V position will then be required to assist with actions necessary for continuing eligibility or increased number of recipients, and added volume of data input.</p>						
	1	2	AMOUNT								3
	PERSONAL SERVICES										
5.	Salary	1,914/mo.	22,968								
6.	Benefits		1,454								
7.	Supplemental Benefits		1,408								
8.	Fixed Benefits		2,880								
9.	TOTAL PERSONAL SERVICES		01	28,710							
10.	Travel		02								
11.	Contractual		03								
12.	Commodities		04								
13.	Equipment		05								
14.	Other										
15.	TOTAL COST										28,710
	RECEIPT CODE	FUNDING SOURCE									
16.		Federal Receipts 1002									
17.		G.F. Match 1003									
18.	100	General Funds 1004			28,710						
19.		I-A Receipts 1005									
20.		Program Receipts 1028									
21.		Other									
FOR B&M USE ONLY											
4A KEY NUMBER. _____											

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPRDV.	DISAPP.					
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 2	LOCATION Juneau	ELECTION DISTRICT 4	LEG.							
3.	CONTINUATION LEVEL				JUSTIFICATION										
4.	TYPE OF EXPENDITURE				<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Four (4) permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>										
	1	2	3												
	PERSONAL SERVICES														
5.	Salary	1,510/MO.	12,080												
6.	Benefits		2,042												
7.	Supplemental Benefits														
8.	Fixed Benefits														
9.	TOTAL PERSONAL SERVICES		01	14,122											
10.	Travel		02												
11.	Contractual		03												
12.	Commodities		04												
13.	Equipment		05												
14.	Other														
15.	TOTAL COST			14,122											
	RECEIPT CODE	FUNDING SOURCE													
16.		Federal Receipts 1002													
17.		G.F. Match 1003													
18.	100	General Funds 1004		14,122											
19.		I-A Receipts 1005													
20.		Program Receipts 1028													
21.		Other													
FOR B&M USE ONLY															
4A KEY NUMBER															

13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Agen
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12	PAGE/LINE	GOV.	APPRDVS.	DISAPP.
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 3	LOCATION Juneau	ELECTION DISTRICT 4		LEG.		
3.	CONTINUATION LEVEL				JUSTIFICATION						
4.	TYPE OF EXPENDITURE			AMOUNT	<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. Prior to approval, each application received must be date-stamped, registered, scrutinized for completeness, acknowledged and filed. In addition, documentation verifying applicant's completion of the requirements will be requested if not received with the application.</p> <p>Four (4) permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.</p>						
	1	2	3								
	PERSONAL SERVICES										
5.	Salary	1,510/mo.	12,080								
6.	Benefits		2,042								
7.	Supplemental Benefits										
8.	Fixed Benefits										
9.	TOTAL PERSONAL SERVICES	01	14,122								
10.	Travel	02									
11.	Contractual	03									
12.	Commodities	04									
13.	Equipment	05									
14.	Other										
15.	TOTAL COST		14,122								
	RECEIPT CODE	FUNDING SOURCE									
16.		Federal Receipts	1002								
17.		G.F. Match	1003								
18.	100	General Funds	1004	14,122							
19.		I-A Receipts	1005								
20.		Program Receipts	1028								
21.		Other									
FOR B&M USE ONLY											
4A KEY NUMBER											

13 REQUEST FOR
NEW POSITION

AGENCY Administration

PROGRAM Social and Economic Assistance
for the Aged

BRU Longevity Bonus Program

COMPONENT _____

FY 85

Page _____ of _____

Revised Date _____

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12	PAGE/LINE	COV.	APPROV.	DISAPP.																																																																																				
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NEW POSITION

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Social and Economic Assistance
PROGRAM for the Aged
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Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP.		
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3.	CONTINUATION LEVEL				JUSTIFICATION							
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Social and Economic Assistance
PROGRAM for the Aged
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COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

STATE OF ALASKA 1984 LEGISLATIVE SESSION
FISCAL NOTE

Revision Date: _____
Page 1 of 3

<u>REQUEST</u> Bill/Resolution No.: <u>S.B. 347</u> Title: <u>Permanent Fund/Longevity Bonus</u> Sponsor: <u>Ray</u> Requestor: _____ Date of Request: _____	<u>FISCAL DETAIL</u> Agency Affected: <u>Administration</u> Program Category Affected: <u>Social Services</u> BRU, Program of Subprogram(s) Affected: <u>Longevity Bonus Program</u>
---	---

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89
OPERATING						
100 PERSONAL SERVICES	0	85.2	28.7	28.7	28.7	28.7
200 TRAVEL	0					
300 CONTRACTUAL	0	85.0	85.5	86.0	86.5	87.0
400 COMMODITIES	0	1.5	1.0	1.0	1.0	1.0
500 EQUIPMENT	0					
600 LAND & STRUCTURES	0					
700 GRANTS, CLAIMS, ETC	0	27,012.0	9,363.8	10,275.4	11,514.5	12,642.0
TOTAL OPERATING	0	27,183.7	9,479.0	10,391.1	11,630.7	12,758.7
CAPITAL	0	0	0	0	0	0
REVENUE	0	0	0	0	0	0

FUNDING: (Thousands of Dollars)

GENERAL FUND	0	(11,716.3)	(33,088.0)	(35,248.3)	(37,407.8)	(39,567.3)
FEDERAL FUNDS						
OTHER (Permanent Fund)	0	38,900.0	42,567.8	45,639.4	49,038.5	52,326.0
TOTAL	0	27,183.7	9,479.0	10,391.1	11,630.7	12,758.7

POSITIONS:

FULL-TIME	0	1.0	1.0	1.0	1.0	1.0
PART-TIME	0	2.7	0	0	0	0
TEMPORARY						
TOTAL	0	3.7	1.0	1.0	1.0	1.0

SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL:

Permanent Fund

ANALYSIS: Attach a separate page for any Analysis.

Prepared By: E. Louis Keller, Director *E. Louis Keller* Phone: 465-4401
 Division: Pioneers' Benefits Date: 1/23/84

Approved by Commissioner: Lisa Rudd *Lisa Rudd* Date: 1/26/84
 Agency: DEPARTMENT OF ADMINISTRATION

Distribution (by Agency preparing fiscal note):
 Legislative Finance
 Legislative Sponsor
 Requestor
 Office of Management and Budget
 Impacted Agency(ies)

Senate Bill 347
Fiscal Note Analysis
Prepared by Division of Pioneers' Benefits
Department of Administration
January 23, 1984

This bill will increase the number of persons eligible for the Longevity Bonus Program and decrease the amount of the monthly bonus payments.

Assumptions

- a. All persons who are age 65 and older who have been residents of Alaska for at least one year will be eligible.
- b. It is believed that there are approximately 16,500 persons now living in Alaska who will qualify under new eligibility requirements, and that there will be approximately 10,348 persons on the program by July 1, 1984. Therefore, it is assumed that an additional 6,152 persons will be enrolled on the program in FY 85 under the bill.
- c. The amount of the monthly bonus will be \$200, increased by 3% each year beginning in FY 86.
- d. The program will continue to grow at the rate of approximately 60 per month, after the initial group of persons are enrolled who will be made eligible by the one-year residency requirement.
- e. Retroactive payments in the amount of \$250 per month will be made to approximately 6,152 persons who would have been eligible on July 1, 1983.
- f. All administrative expenses (program management and operating costs, exclusive of bonus payments) will be paid from the General Fund. All bonus payments will be paid from the Longevity Bonus Account established from earnings of the Permanent Fund except for approximately \$700,000 for FY 85 bonus payments, and \$18,456,000 in retroactive payments. According to estimates of Permanent Fund earnings, funds deposited in the Longevity Bonus Account for FY 85 will be insufficient to pay the full amounts required.
- g. An increase in the Longevity Bonus staff will be needed to process the flood of new applications.
- h. The Act will become effective on July 1, 1984.

Additional funds needed for FY 85 are computed as follows:

	<u>Annual Cost</u>
Personal Services	\$ 85,196
Clerk V, PFT	\$28,710
Clerk II, PPT (4 positions, 8 months)	56,486

Senate Bill 347
 Fiscal Note Analysis
 Prepared by Division of Pioneers' Benefits
 Department of Administration
 January 23, 1984

(Continued)	<u>Annual Cost</u>
Contractual Services Added postage, bonus warrants, printing of new regulations and application forms and increased telephone tolls	85,000
Commodities Office supplies and file cabinets for application and recipient files	1,500
Grants Additional funds needed for Bonus payments to additional persons who will be eligible (6,152 x 12 x \$200)	14,764,800
Difference in cost per month for those already enrolled on July 1, 1984; \$50 per month reduction (\$50 x 12 x 10,348)	(6,208,800)
Retroactive payments to those who would have been eligible as of July 1, 1983 (\$250 x 12 x 6,152)	18,456,000
Total additional funds required for FY 85	<hr style="width: 100%;"/> \$27,183,696

1.	POSITION TITLE Clerk V				RANGE/STEP 11B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPROV.	DISAPP.
2.	TYPE OF POSITION PFT	STAFF MONTHS 12	RP NUMBER	PCN NUMBER	BRU PRIORITY 1	LOCATION Juneau	ELECTION DISTRICT 4	LEG.		
3.	CONTINUATION LEVEL				JUSTIFICATION					
4.	TYPE OF EXPENDITURE				<p>The program expects to receive applications from 6,152 persons who will meet the new eligibility requirements when the bill is effective. A Clerk V position is required to supervise four PPT Clerk II positions, who will be required to process the volume of applications. In addition, the Clerk V will be responsible for calculation of any retroactive benefits which may be due.</p> <p>At the end of eight months, it is expected that the receipt of applications will level off and the Clerk V position will then be required to assist with actions necessary for continuing eligibility of increased number of recipients, and added volume of data input.</p>					
	1	2	3							
	PERSONAL SERVICES									
5.	Salary	1,914/mo.	22,968							
6.	Benefits		1,454							
7.	Supplemental Benefits		1,408							
8.	Fixed Benefits		2,880							
9.	TOTAL PERSONAL SERVICES	01	28,710							
10.	Travel	02								
11.	Contractual	03								
12.	Commodities	04								
13.	Equipment	05								
14.	Other									
15.	TOTAL COST		28,710							
	RECEIPT CODE	FUNDING SOURCE								
16.		Federal Receipts	1002							
17.		G.F. Match	1003							
18.	100	General Funds	1004	28,710						
19.		I-A Receipts	1005							
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FOR B&M USE ONLY										
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13 REQUEST FOR
NEW POSITION

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

1.	POSITION TITLE Clerk II				RANGE/STEP 7B	BARG. UNIT G	FORM 12 PAGE/LINE	GOV.	APPRDV.	DISAPP.
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCN NUMBER	BRU PRIORITY 2	LOCATION Juneau	ELECTION DISTRICT 4	LEG.		
3.	CONTINUATION LEVEL				JUSTIFICATION					
4.	TYPE OF EXPENDITURE				AMOUNT					
	1		2		3					
	PERSONAL SERVICES									
5.	Salary	1,510/mo.			12,080					
6.	Benefits			2,042						
7.	Supplemental Benefits									
8.	Fixed Benefits									
9.	TOTAL PERSONAL SERVICES		01	14,122						
10.	Travel			02						
11.	Contractual			03						
12.	Commodities			04						
13.	Equipment			05						
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15.	TOTAL COST				14,122					
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16.		Federal Receipts 1002								
17.		G.F. Match 1003								
18.	100	General Funds 1004		14,122						
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FOR B&M USE ONLY 4A KEY N° BER										

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Four (4) permanent part time Clerk II positions will be required to process the volume of applications in a timely manner. It is expected that the large volume of applications will level off at the end of eight months and the additional positions will no longer be required.

13 REQUEST FOR
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3.	CONTINUATION LEVEL				ADDITION							
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13 REQUEST FOR
NEW POSITION

01-1136 (7/82) - 13

19/7D1/0124-10/4

AGENCY Administration
Social and Economic Assistance
PROGRAM for the Aged
BRU Longevity Bonus Program
COMPONENT _____

Page _____ of _____
Revised Date _____

FY 85

STATE OF ALASKA
THE LEGISLATURE

POLCHY STATE CAPITOL
JUNEAU ALASKA 99801
107 400 0800

LEGISLATIVE AFFAIRS AGENCY

MEMORANDUM

February 20, 1984

SUBJECT: Funding for retroactive provisions
of CSSB 347 (Judiciary)

TO: Senator Bill Ray *SAA*

FROM: Linn H. Asper *LH*
Legislative Counsel

You have asked if CSSB 347 (Judiciary), as currently drafted, requires that the money needed to make payment of retroactive longevity bonuses under the proposed residency requirements must come from the 12.5 percent of permanent fund income that is to be credited to the longevity bonus account.

The starting point for this inquiry is that there is nothing in the current version of SB 347 that indicates where the retroactive money is to come from. This means that a general fund appropriation could be made to finance the retroactive payments. Looking at the provisions of the bill that deal with the longevity bonus account and the longevity bonus fund, it becomes apparent that money in those funds is not intended to be used for retroactive payments. AS 37.13.147(c), proposed in section 1 of the bill, states that "The legislature may annually appropriate an amount sufficient to pay monthly longevity bonuses for the subsequent fiscal year" (Emphasis added) This language indicates that the new source for financing longevity bonus payments is to be used for future payments rather than retroactive payments. Of course, the language of the proposed subsection does not prevent the legislature from making an appropriation from the longevity bonus account for retroactive payments if it wishes to do so, but such an appropriation is not mandated by the language of the bill. As I understand the proposed mechanism for paying longevity bonuses, the size of a monthly bonus would be decreased if the retroactive appropriation were to be made from the longevity bonus account. This is clearly not the intent of the bill.

LHA:ojb
J3/114

COMMITTEE REPORT
SENATE

FURTHER:

FINANCE

1/11/84

Date: Feb. 1, 1984

Mr. President:

The Committee on JUDICIARY has had SB 347

authorizing the use of Alaska permanent fund income to pay longevity bonuses; amending the longevity bonus program and the permanent fund dividend distribution program; efd.
under consideration and (a majority of the committee) (the committee) reports it back with the following recommendations:

- do pass do not pass
- do pass with attached amendments(s)
- replace with CS for SB 347 (Jud) same title
 new title
- and recommends 1 may do pass
- AND attaches a "Letter of Intent" New Fiscal Note
- reports it back without recommendation
- referred to the _____ Committee

MEMBERS SIGNING
DO PASS

[Signature]

[Signature]

MEMBERS HAVING
OTHER RECOMMENDATIONS:

2 [Signature] NR

2 [Signature] NR

[Signature]
CHAIRMAN
DO PASS

Introduced: 1/11/84
Referred: Judiciary and
Finance

1 IN THE SENATE

BY RAY AND KERTTULA

2

SENATE BILL NO. 347

3

IN THE LEGISLATURE OF THE STATE OF ALASKA

4

THIRTEENTH LEGISLATURE - SECOND SESSION

5

A BILL

6 For an Act entitled: "An Act authorizing the use of Alaska permanent fund
7 income to pay longevity bonuses; amending the longev-
8 ity bonus program and the permanent fund dividend
9 distribution program; and providing for an effective
10 date."

11 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF ALASKA:

12 * Section 1. AS 37.13 is amended by adding a new section to read:

13 Sec. 37.13.147. LONGEVITY BONUS ACCOUNT. (a) The longevity
14 bonus account is established as a separate account in the Alaska per-
15 manent fund. Notwithstanding the provisions of AS 37.13.145, 12.5
16 percent of the income of the permanent fund earned during the fiscal
17 year ending on June 30 of the current year that is available for dis-
18 tribution under AS 37.13.140 shall be credited to the longevity bonus
19 account.

20 (b) Money in the longevity bonus account shall be invested in
21 investments authorized under AS 37.13.120. The longevity bonus ac-
22 count shall be credited with earnings at an interest rate equal to the
23 average rate of interest earned on the Alaska permanent fund.

24 (c) The legislature may annually appropriate an amount suffi-
25 cient to pay monthly longevity bonuses for the subsequent fiscal year
26 under AS 47.45.010(d) from the longevity bonus account to the Alaska
27 longevity bonus fund established under AS 47.45.090.

28 * Sec. 2. AS 43.23.045(b) is amended to read:

29 (b) Notwithstanding any contrary provision of law, each year the

1 commissioner shall transfer to the dividend fund 37.5 [50] percent of
2 the income of the Alaska permanent fund earned during the fiscal year
3 ending on June 30 of the current year and available for distribution.

4 * Sec. 3. AS 47.45.010 is amended to read:

5 Sec. 47.45.010. PERSONS WHO MAY QUALIFY FOR LONGEVITY BONUS.

6 (a) A person who is 65 years of age or over, who has been a resident
7 of the state for at least one year immediately preceding the applica-
8 tion for a longevity bonus under this chapter [WAS DOMICILED IN THE
9 TERRITORY ON OR BEFORE JANUARY 3, 1959 AND WHO HAS MAINTAINED A CON-
10 TINUOUS DOMICILE IN THE TERRITORY OR STATE FOR 25 YEARS] may apply to
11 the commissioner of administration for qualification to receive a
12 monthly bonus [OF \$250].

13 (b) When the commissioner of administration determines that an
14 applicant qualifies under AS 47.45.010 - 47.45.170 the commissioner
15 [HE] shall immediately begin payment of the bonus.

16 (c) A person who otherwise qualifies to receive a bonus provided
17 for in AS 47.45.010 - 47.45.170 may continue to do so only as long as
18 that person continues to be a resident of [HE CONTINUOUSLY RETAINS A
19 DOMICILE IN] the state.

20 * Sec. 4. AS 47.45.010 is amended by adding a new subsection to read:

21 (d) The amount of the monthly bonus is (1) \$200, increased by
22 three percent each year beginning in the state fiscal year 1986; or
23 (2) an amount equal to eight and one-third percent of the amount
24 credited to the longevity bonus account for the previous fiscal year
25 under AS 37.13.147, exclusive of earnings, divided by the number of
26 qualified applicants under this section; whichever amount is less.

27 * Sec. 5. AS 47.45.030 is amended to read:

28 Sec. 47.45.030. ABSENCE FROM THE STATE. After qualification a
29 [A] recipient shall notify the commissioner of administration when the

1 recipient [HE] expects to be absent from the state if the absence is
2 for a continuous period that exceeds 30 days. After that notifica-
3 tion, the recipient shall no longer receive bonuses from the Depart-
4 ment of Administration after the [HIS] last regularly approved monthly
5 application. Upon returning [HIS RETURN] to the state the recipient
6 [HE] may again make application for a bonus. Whenever the absence is
7 for a continuous period that exceeds 180 days the recipient shall be
8 disqualified from receiving bonuses for the next 12 calendar months
9 after returning [HIS RETURN] to the state. However, when the commis-
10 sioner of administration determines a period of absence is beyond the
11 control of the recipient, the recipient [HE] may not be disqualified,
12 if the recipient [HE] still otherwise qualifies upon returning [HIS
13 RETURN] to the state. Continual absences from the state, even though
14 reported, and failure to notify the commissioner of an expected ab-
15 sence may be grounds for disqualification.

16 * Sec. 6. AS 47.45.090 is repealed and reenacted to read:

17 Sec. 47.45.090. ALASKA LONGEVITY BONUS FUND. The Alaska longev-
18 ity bonus fund is established for the purpose of paying the monthly
19 bonuses provided for in this chapter. The fund consists of money
20 appropriated to the fund by the state legislature from the longevity
21 bonus account established under AS 37.13.147.

22 * Sec. 7. AS 47.45 is amended by adding a new section to read:

23 Sec. 47.45.145. ACCESS TO RECORDS. (a) Notwithstanding any
24 contrary provision of state law or state agency regulation, the com-
25 missioner of administration may have access to and examine records,
26 documents, or other information in the possession of a state agency,
27 other than personal income tax returns filed under AS 43.20, if the
28 records, documents, or information relate to the length of state
29 residence of an applicant for, or a recipient of, a monthly bonus

1 under this chapter.

2 (b) If the commissioner of administration receives confidential
3 information under (a) of this section, that information may be used
4 only to confirm or rebut an applicant's declaration of length of state
5 residence. If a person discloses information obtained under this
6 section for a purpose other than to rebut an applicant's declaration
7 of length of state residence in an appropriate administrative or
8 judicial proceeding, that person is subject to the penalty that
9 applies to unauthorized disclosure of that information by the agency
10 or person that has primary custody, and control of the information.

11 * Sec. 8. AS 47.45.150 is amended by adding a new paragraph to read:

12 (3) "resident" or "resident of the state" means an indi-
13 vidual who is physically present in the state with the intent to
14 remain in the state indefinitely and to make a home in the state. A
15 person demonstrates the requisite intent only by maintaining a princi-
16 pal place of abode in the state for the one year required by AS 47.-
17 45.010(a) and by providing other proof of intent the commissioner may
18 require by regulation, including proof that the person is not claiming
19 residency outside the state or obtaining benefits under a claim of
20 residency outside the state.

21 * Sec. 9. AS 47.45.170 is repealed and reenacted to read:

22 Sec. 47.45.170. FINDINGS AND PURPOSE. The legislature finds and
23 declares that

24 (1) the high cost of goods and services in Alaska and the
25 state's remoteness and harsh environment, make it difficult for many
26 elderly Alaskans to remain in the state after retirement;

27 (2) when a person is forced to live out retirement years
28 away from home, family and friends, that person suffers an irreparable
29 loss;

1 (3) Alaska's elderly are a precious human resource, and it
2 is in the public interest to provide a financial incentive for them to
3 remain in the state after retirement;

4 (4) as oil revenues decrease, it will become increasingly
5 difficult for the legislature to fund the longevity bonus program
6 through annual appropriations and the income of the Alaska permanent
7 fund is an appropriate source of funding for the longevity bonus
8 program; and

9 (5) it is in the public interest to continue the longevity
10 bonus program for all elderly Alaskans irrespective of need. The
11 longevity bonus program is not a form of welfare, and is not a substi-
12 tute for or supplement to public assistance. Other programs are
13 available to provide the basic necessities of life. The longevity
14 bonus program is intended only to encourage elderly Alaskans to spend
15 their retirement years in the comfort of their homes.

16 * Sec. 10. AS 47.45.150(2) and sec. 2, ch. 205, SLA 1972 are repealed.

17 * Sec. 11. Sections 3 and 8 of this Act are retroactive to July 1,
18 1983.

19 * Sec. 12. This Act takes effect July 1, 1984.

Offered: 2/2/84
Referred: Finance

Original sponsors: Ray and Kerttula

1 IN THE SENATE BY THE JUDICIARY COMMITTEE
2 CS FOR SENATE BILL NO. 347 (Judiciary)
3 IN THE LEGISLATURE OF THE STATE OF ALASKA
4 THIRTEENTH LEGISLATURE - SECOND SESSION
5 A BILL

6 For an Act entitled: "An Act authorizing the use of Alaska permanent fund
7 income to pay longevity bonuses; amending the longev-
8 ity bonus program and the permanent fund dividend
9 distribution program; and providing for an effective
10 date."

11 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF ALASKA:

12 * Section 1. AS 37.13 is amended by adding a new section to read:

13 Sec. 37.13.147. LONGEVITY BONUS ACCOUNT. (a) The longevity
14 bonus account is established as a separate account in the Alaska per-
15 manent fund. Notwithstanding the provisions of AS 37.13.145, 12.5
16 percent of the income of the permanent fund earned during the fiscal
17 year ending on June 30 of the current year that is available for dis-
18 tribution under AS 37.13.140 shall be credited to the longevity bonus
19 account.

20 (b) Money in the longevity bonus account shall be invested in
21 investments authorized under AS 37.13.120. The longevity bonus ac-
22 count shall be credited with earnings at an interest rate equal to the
23 average rate of interest earned on the Alaska permanent fund.

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14 bonus program is intended only to encourage elderly Alaskans to spend
15 their retirement years in the comfort of their homes.

16 * Sec. 10. AS 47.45.150(2) and sec. 2, ch. 205, SLA 1972 are repealed.

17 * Sec. 11. Sections 3 and 8 of this Act are retroactive to July 1,
18 1983.

19 * Sec. 12. This Act only takes effect if the Alaska Supreme Court
20 affirms the decision of the superior court in the case of Rodney Vest et al
21 v. Marian Schafer and State of Alaska, No. 1JU-82-1103 CIV, Superior Court
22 for the State of Alaska, First Judicial District at Juneau, on the consti-
23 tutionality of the Alaska longevity bonus program; in that event this Act
24 takes effect 30 days after th date of the final decision of the Alaska
25 Supreme Court.