

LEG. FINANCE - BILLS 1983 - 1984 2096

SB 347 cont. 2096

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
<u>MALE</u>										
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
<u>FEMALE</u>										
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
<u>TOTAL</u>										
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
<u>LIVING IN FAMILY HOUSEHOLD</u>				
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
<u>LIVING ALONE</u>				
Males	12	9.3	20	13.2
Females	10	7.8	17	11.3
Total	22	17.1	37	24.5
<u>LIVING IN GROUP QUARTERS</u>				
Inmate of Institution	0	0.0	5	3.3
Other	1	0.8	0	0.0
Total	1	0.8	5	3.3
<u>TOTAL</u>	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  
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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

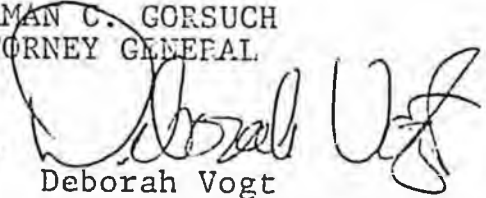
Vest would not have to litigate his claim for the included period (i.e. from July 1, 1982 to the present).

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

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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
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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) 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.

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.											
XX 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											
XXGF + 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%; border: 0.5px solid black;"/> \$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			ADDITION						
	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						
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. 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.

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  
NEW POSITION

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

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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 \_\_\_\_\_

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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 \_\_\_\_\_

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Revised Date \_\_\_\_\_

**FY 85**

STATE OF ALASKA 1984 LEGISLATIVE SESSION  
FISCAL NOTE

Revision Date: 2/1/84

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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, Director  
Division: Pioneers' Benefits

Phone: 465-4400  
Date: February 1, 1984

Approved by Commissioner 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.	
2.	TYPE OF POSITION PPT	STAFF MONTHS 8	RP NUMBER	PCH NUMBER	BRU PRIORITY 4	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			2,042								
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							
JUSTIFICATION												
<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>												
16.	RECEIPT CODE		FUNDING SOURCE									
17.			Federal Receipts 1002									
18.	100		G.F. Match 1003									
19.			General Funds 1004									
20.			I-A Receipts 1005									
21.			Program Receipts 1028									
			Other									
<p>FOR B&amp;M USE ONLY</p> <p>4A KEY NUMBER _____</p>												

**13** REQUEST FOR  
NEW POSITION

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

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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 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 Aged  
BRU Longevity Bonus Program  
COMPONENT \_\_\_\_\_

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Revised Date \_\_\_\_\_

**FY 85**

STATE OF ALASKA 1984 LEGISLATIVE SESSION  
FISCAL NOTE

Revision Date: \_\_\_\_\_

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
<b>OPERATING</b>						
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
<b>TOTAL OPERATING</b>	0	27,183.7	9,479.0	10,391.1	11,630.7	12,758.7
<b>CAPITAL</b>	0	0	0	0	0	0
<b>REVENUE</b>	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
<b>TOTAL</b>	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						
<b>TOTAL</b>	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: 465-4401  
 Date: 1/23/84

Approved by Commissioner: Lisa Rudd  
 Agency: DEPARTMENT OF ADMINISTRATION

Date: 1/26/84

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  
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
	<hr/>
Total additional funds required for FY 85	\$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									
16.					Federal Receipts 1002					
17.					G.F. Match 1003					
18.	100			28,710	General Funds 1004					
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 \_\_\_\_\_

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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						
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 N° BER										

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.

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  
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				ADDITION							
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									
14.	Other											
15.	TOTAL COST			14,122								
JUSTIFICATION												
<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>												
	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.	APPRDV.	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						
	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 _____										

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.

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  
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 5	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								
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21.		Other								
FOR B&M USE ONLY										
4A KEY NUMBER _____										

**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 \_\_\_\_\_

**FY 85**

Page \_\_\_\_\_ of \_\_\_\_\_  
Revised Date \_\_\_\_\_

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

1 [Signature]

1 [Signature]

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

MEMBERS HAVING  
OTHER RECOMMENDATIONS:

2 [Signature] NR

2 [Signature] NR

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

1 Bill Ray  
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 47.45.019(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  
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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  
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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.