

Oregon State Unit on Aging Intrastate Funding Formula (IFF)

Oregon's Older Americans Act (OAA) grant award, Oregon Project Independence, and Legislative special purpose appropriations are allocated to individual Area Agencies on Aging based on a combination of a Base Amount formula, a Land Area formula, and a Population formula on a biennial basis. OAA Sections 305(a)(2)(C) have been met, and criteria set forth in Sections 305(a)(2)(C)(i) and (ii) have been considered and factor weights in Oregon's funding formula are based upon the most current census data released.

Summary

The **base amount formula** allocates a predetermined amount to each area agency.

The **land area formula** allocates a percentage based on the agency's share of Oregon's total square mileage:

- 5% of Older Americans Act award after subtracting base amount for applicable titles
- 5% of Oregon Project Independence appropriation

The method used to meet the needs for services in rural areas are percentages of the OAA allocation distribution based upon each AAA share of Oregon's total square mileage. The land area formula is used in allocating Title IIIB, IIIE, VII Ch. 3 funds and Oregon Project Independence.

The **population formula** bases an agency's percentage of the grant allocation on the agency's share of population factors compared to Oregon's total for each factor. The amount allocated based on population is the total amount less allocations for base amount and/or land area where applicable.

The population factors overlap: For example, those who are 75+ are counted once in the 60+ factor and again in the 75+ factor. Those who are in poverty are counted once in the 60+ and again in this separate factor. Similarly, those who are a minority senior 65+ are counted twice (once in the 60+ and once in the factor for minority). The result is that those 75+, minority 65+, and poverty 65+ are weighted twice that of those 60+. If a senior were 75+, minority and in poverty, they would be counted in all four demographic factors.

The number of minority older Oregonians was used in calculating the allocations for Title IIIB, IIIC, IIIE and VII Ch. 3. Minority plus poverty was the primary factor used in allocating Title IIID Preventive Health funds. Each funding source has a separate allocation (supportive services, congregate meals, home delivered meals, family caregiver support, elder abuse prevention, preventive health, Oregon Project Independence and when applicable, Legislative special purpose appropriations). The chart below demonstrates how the three formulas are used to allocate the available funds for the seven programs.

	Biennial Base Amount	Land Area	Population Formula 1	Population Formula 2	Population Formula 3
OAA Title IIIB: Supportive Services	\$55,000	5.0%	remaining 95%	Not used	Not used
OAA Title IIIC-1: Congregate Meals	\$20,000	Not Used	remaining 100%	Not used	Not used
OAA Title IIIC-2: Home Delivered Meals	\$5,000	Not Used	remaining 100%	Not used	Not used
OAA Title IIID: Preventive Health	\$3,000	Not Used	Not used	remaining 100%	Not used
Title IIIE: Family Caregiver Support	Not Used	5.0%	Not used	Not used	remaining 95%
Title VII Ch. 3: Elder Abuse Prevention	\$1,000	5.0%	remaining 95%	Not used	Not used
Oregon Project Independence	Not Used	5.0%	remaining 95%	Not used	Not used
Legislative Special Purpose Appropriation	Not Used	Varies depending upon purpose of funds: General use – 5% land, 95% population; health promotion use – \$3K base and Population Formula 2.			

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Population Formula 1: (IIIB, IIIC-1, IIIC-2, VII Ch. 3, and OPI)

- a. population 60 years and older, plus
- b. population 75 years and older, plus
- c. minority population 65 years and older, plus
- d. poverty population 65 years and older with incomes below 125% of federal poverty level.

IIIB

Fixed Biennial Region Base of \$55,000 + Oregon State Land Square Mile base percentage of *.05 {region metric/state metric} + population combined percentage of *.95 {region metric/state metric}, (60 years and older) + (75 years and older) + (minority population 65 years and older) + (poverty population 65 years and older with incomes below 125% federal poverty level), {region metric/state metric}=total award.

IIIC1

Fixed Biennial Region Base of \$20,000 + population combined percentage of *100% {region metric/state metric}, (60 years and older) + (75 years and older) + (minority population 65 years and older) + (poverty population 65 years and older with incomes below 125% federal poverty level), {region metric/state metric}=total award.

IIIC2

Fixed Biennial Region Base of \$5,000 + population combined percentage of *100% {region metric/state metric}, (60 years and older) + (75 years and older) + (minority population 65 years and older) + (poverty population 65 years and older with incomes below 125% federal poverty level), {region metric/state metric}=total award.

VII Chapter 3

Fixed Biennial Region Base of \$1,000 + Oregon State Land Square Mile base percentage of *.05 {region metric/state metric} + population combined percentage of *.95 {region metric/state metric}, (60 years and older) + (75 years and older) + (minority population 65 years and older) + (poverty population 65 years and older with incomes below 125% federal poverty level), {region metric/state metric}=total award.

Population Formula 2: (IIID)

- a. population 75 years and older, plus
- b. minority population 65 years and older, plus
- c. poverty population 65 years and older with incomes below 125% of federal poverty level.

Fixed Biennial Region Base of \$3,000 + population combined percentage of *100%, {region metric/state metric}, (75 years and older) + (minority population 65 years and older) + (poverty population 65 years and older with incomes below 125% federal poverty level), {region metric/state metric}=total award.

Population Formula 3: (IIIE)

- a. population 70 years and older, plus
- b. minority population 65 years and older, plus
- c. poverty population 65 years and older with incomes below 125% of federal poverty level.

Oregon State Land Square Mile base percentage of *.05 {region metric/state metric} + population combined percentage of *.95, (70 years and older) + (minority population 65 years and older) + (poverty population 65 years and older with incomes below 125% federal poverty level), {region metric/state metric}=total award.

Base Congregate and Home Delivered Allocation:

Because both nutrition titles determine allocation on population alone, Oregon's least populated regions can receive less than the cost to provide minimum services. For this reason, a base amount is used for the allocation AAAs receive for Congregate Meals (Title IIIC1) and Home Delivered Meals (Title IIIC2). There is a base of \$20,000 for Congregate Meals and a base of \$5,000 for Home Delivered Meals. The remaining amount is distributed based on the population factors outlined above.

State deductions from Title III Funds:

Prior to distribution to AAAs under the IFF, the State deducts 5% of the Title III allocation for State Plan Administration. The State also holds \$56,914 per fiscal year from the Title IIIB allocation to distribute to the Long Term Care Ombudsman program. The remainder is then distributed to AAAs via the IFF.

Nutrition Services Incentive Program (NSIP) fund distribution:

Oregon disburses NSIP funds to AAA nutrition service programs, and the funding is a proportional share based upon the number of eligible meals served in the prior year. NSIP eligible meals are those meals served to an individual who is qualified to receive services as defined in the OAA. Oregon has chosen, based on technical assistance from the US Administration on Aging, to include all OAA and traditional Oregon Project Independence (OPI) congregate and home-delivered meals as NSIP eligible meals.

Oregon's current minimum Title IIIB expenditure requirements for funding for priority services of access, in-home and legal assistance services are:

- Access: 18%
- Legal: 3%
- In-Home: 3%