The Anatomy of Delaware’s Senior Center Funding Formula

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GIA Funded Senior Centers in Delaware

48 centers throughout 4 regions:

- 15 in Wilmington
- 13 in New Castle County (Remainder of NCC)
- 7 in Kent County
- 13 in Sussex County
Application of the Formula

- $6.35 million appropriated for FY 2001
- Two-Tiered funding formula
The Two-Tiered Formula

Tier 1
- State → 4 Regions

Tier 2
- Regions → Centers
Application of the Formula

- $6.35 million appropriated for FY 2001
- Two-Tiered funding formula
- Implementation practices to date
  - Since 1985, formula applied to “new” funds appropriated each year
  - No funding cuts to individual centers
  - All centers share in new funding (whether “underfunded” or “overfunded”)
- In FY 1999 - FY 2001, extra formula-determined funding
Average GIA Allocation per Senior Center by Region, FY 2001
($ thousands)

- Delaware: $132
- Wilmington: $109
- Balance NCC: $175
- Kent: $144
- Sussex: $111
Where Do Seniors Reside?
Distribution of Seniors by Region: 1984-2005

- Wilmington: 17%, 11%, 11%, 11%
- New Castle: 48%, 48%, 47%, 45%
- Kent: 14%, 16%, 15%, 17%
- Sussex: 22%, 26%, 27%, 27%
The First Tier

- Allocates funds from the state to the four regions based on three demographic factors
  - Population 60+ (weight = 0.45, or 45%)
  - Population 60+ below poverty level (weight = 0.45, or 45%)
  - Population 75+ (weight = 0.10, or 10%)
The Second Tier

- Allocates funds internally within a region to each center based on two variables
  - Center’s average daily attendance category (0-49, 50-99, 100-149, …)
  - Center’s service level category (SL1 – SL6)

Starting with 2001 appropriations, JFC approved expansion of service level categories from 4 to 6 (IPA developed new category definitions in consultation with OCG & SC-Advisory Committee)
Senior Center Funding Formula

State of Delaware - GIA

City of Wilmington
Remainder of New Castle Co.
Kent County
Sussex County
Senior Center Funding Formula

Tier 1 Criteria
- Geography
- Demography

City of Wilmington
Remainder of New Castle Co.
Kent County
Sussex County
Senior Center Funding Formula

State of Delaware - GIA

Tier 1 Criteria
- Geography
- Demography

$1000

$192 $393 $182 $233

City of Wilmington
Remainder of New Castle Co.
Kent County
Sussex County
Senior Center Funding Formula

Tier 1 Criteria
- Geography
- Demography

State of Delaware - GIA

City of Wilmington
Remainder of New Castle Co.
Kent County
Sussex County

Hypothetical Kent County Example:
- Frederica Senior Center
- Harrington Senior Center
- Modern Maturity Senior Center
Senior Center Funding Formula

**Tier 1 Criteria**
- Geography
- Demography

**Tier 2 Criteria**
- Participation Level
- Service Level

**Hypothetical Kent County Example:**
- Frederica Senior Center
- Harrington Senior Center
- Modern Maturity Senior Center
GIA Funding vs. Senior Population
FY 1984 Funding Levels

% of Population vs. % of Funding
- Wilmington: 17%
- New Castle: 47%
- Kent: 14%
- Sussex: 22%
- New Castle: 32%
- Kent: 11%
- Sussex: 13%
GIA Funding vs. Senior Population
FY 1997 Funding Levels

% of population

% of funding

Wilmington
New Castle
Kent
Sussex
GIA Funding vs. Senior Population
FY 2001 Funding Levels

% of population | % of funding
---|---
Wilmington | 10% | 26%
New Castle | 47% | 36%
Kent | 16% | 16%
Sussex | 27% | 23%
Funding vs. Low Income Seniors by Region*

*2001 Funding Levels, % Low Income Seniors from 1999 CHEP Estimates

Wilmington
New Castle
Kent
Sussex

% of low income seniors  % of funding

- Wilmington: 29% funding, 22% low income seniors
- New Castle: 30% funding, 22% low income seniors
- Kent: 19% funding, 16% low income seniors
- Sussex: 23% funding, 22% low income seniors
The Second Tier

- Allocates funds internally within a region to each center based on two variables
  
  ✓ Center’s average daily attendance category (0-49, 50-99, 100-149, …)
  
  ✓ Center’s service level category (SL1 – SL6)

Starting with 2001 appropriations, JFC approved expansion of service level categories from 4 to 6 (IPA developed new category definitions in consultation with OCG & SCAC)
1999-2000 Updates of Service Data: Revised Service-Level Distributions
Senior Centers Per Service Level

<table>
<thead>
<tr>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-99 survey</td>
<td>0</td>
<td>6</td>
<td>16</td>
</tr>
<tr>
<td>Post-99 survey</td>
<td>0</td>
<td>3</td>
<td>10</td>
</tr>
</tbody>
</table>
Service-Level Distribution Using the New Service Levels

Distribution Including Service Level 5 and 6
Application of the Formula

- $6.35 million appropriated for FY 2001
- Two-Tiered funding formula
- Implementation practices to date
  - Formula only applies to “new” funds appropriated each year
  - No funding cuts to individual centers
  - All centers share in new funding (whether “underfunded” or “overfunded.”)
- In FY 1999 - FY 2001, extra formula-determined funding. A portion of this funding target to “underfunded” centers.
FY 1998 Senior Center Funding: Appropriations vs. Formula Allocations

Actual Appropriation

Thousands

"Overfunded"

"Underfunded"

100% Formula Determined

Thousands

New Castle
Kent
Sussex
Wilmington
FY 2000 Senior Center Funding: Appropriations vs. Formula Allocations

Additional funding for “underfunded” centers

- New Castle
- Kent
- Sussex
- Wilmington

FY 2000 Senior Center Funding: Appropriations vs. Formula Allocations

- Actual Appropriation
- 100% Formula Determined

“Overfunded”

“Underfunded”
Examples of Factors that Increase a Center’s Funding
(holding everything else constant)

1. Additional funding applied to the GIA formula.
2. Increase in your region’s senior population relative to the other 3 regions.
3. Increase in your center’s avg. daily attendance - into a higher attendance category.
4. Increase in your center’s services to a higher service-level category.
5. Coordination of services with other centers.
6. Fewer centers funded in your region.
Examples of Factors that Decrease a Center’s Funding  
(*holding everything else constant*)

1. Fewer new funds applied to the GIA formula.
2. Decreases in your region’s senior population, or decreases in your either your center’s avg. daily attendance or service level.
3. Larger increases in the senior population of the other 3 regions.
4. Increase in the avg. daily attendance or service level of other centers in your region.
5. More centers funded in your region.
Senior Center Funding Formula

State of Delaware

City of Wilmington
- Geography
- Demography

Remainder of New Castle Co.

Kent County

Sussex County

- Participation Level
- Service Level

Frederica Senior Center

Harrington Senior Center

Modern Maturity Senior Center
The UD Review Process

Step 1: Grant-in-Aid Application
- January: mailed to senior centers
- March: returned to Controller General’s Office

Step 2: Attendance Count Sheets
- August: forms mailed to senior centers
- September: forms completed and returned to IPA

Step 3: Senior Center Visits and Supplemental Information Gathered
- October: visits begin
- January: visit completed and information gathered

Step 4: Allocations Determined
- February: participation- and service-level assignments
- June: formula calculations and allocation recommendations
Recent Data Updates and Purpose of IPA Visits to Your Center

• 1998-1999: Focus on updating attendance data (attendance categories, 2 weeks of center self-reporting, black-out days, match counts by day/time, follow-up visits)

• 1999-2000: Focus on updating service-level data

• 2000-2001: New GIA application form

Treating you in a professional, fair, and courteous manner, our goal is to verify the formula-related information submitted by your center.
# New Visitation Schedule

<table>
<thead>
<tr>
<th>Group A</th>
<th>Group B</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>2002</td>
</tr>
<tr>
<td>2003</td>
<td>2004</td>
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<tr>
<td>2005</td>
<td>2006</td>
</tr>
<tr>
<td>2007</td>
<td>2008</td>
</tr>
<tr>
<td>2009</td>
<td>2010</td>
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</tbody>
</table>
Step 1: Grant-in-Aid Application

2001 Revised Application

- Section 1: Board of Directors and Officer Information Worksheet
- Section 2: Audit Information and Staff Salary Worksheet
- Section 3: Program Planning
- Section 4: Senior Center Agreement
Step 2: Attendance Counts
Participation Levels

- Participation Forms
  - Form A: Senior Center Background Information
  - Forms B & C: Attendance Counts
Step 3: Senior Center Visits
Supplemental Information Gathered

- Participation Level
  - 8 participation ranges
- Service Level
  - 1984: 4 criteria and 4 service levels
  - 2001: 9 criteria and 6 service levels
# 1984 Criteria and Service Levels

<table>
<thead>
<tr>
<th>1984 Criteria</th>
<th>1984 Service Levels</th>
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<tbody>
<tr>
<td></td>
<td>1</td>
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<tr>
<td>Transportation</td>
<td>X</td>
</tr>
<tr>
<td>Nutrition</td>
<td></td>
</tr>
<tr>
<td>Social/Recreational</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
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</tbody>
</table>
## 2001 Criteria and Service Levels

<table>
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<tr>
<td></td>
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<td>Nutrition</td>
<td>X</td>
</tr>
<tr>
<td>Social/Recreational</td>
<td>X</td>
</tr>
<tr>
<td>Adult Day Care</td>
<td>X</td>
</tr>
<tr>
<td>Physical Fitness</td>
<td>X</td>
</tr>
<tr>
<td>Pool or transportation to a pool</td>
<td></td>
</tr>
<tr>
<td>Outreach, Reference, or Economic Security Services</td>
<td></td>
</tr>
<tr>
<td>Computer and/or Language Classes</td>
<td></td>
</tr>
<tr>
<td>Support Groups and/or Intergenerational Programs</td>
<td></td>
</tr>
</tbody>
</table>
Example: Senior Center A

• Achieved a Service Level 5

✓ Provides transportation to and from the center.

✓ Provides lunch daily and hosts a “Meals on Wheels” program.

✓ Has a ceramics/craft room and offers weekly classes.

✓ Has a small fitness center and has a certified fitness instructor who volunteers 3 days a week.

✓ Provides transportation two times per week to the local YMCA pool and on one of those days, there is a water aerobics class offered.

✓ Has an intergenerational program where seniors help tutor high school students.
Example Continued…

• What validation did we use to determine this center was a Service Level 5?
  ✓ What did we look for on the tour?
  ✓ What kinds of questions did we ask the Director?
  ✓ What supplemental information did we ask for?