

**Department of Legislative Services**  
Maryland General Assembly  
2003 Session

**FISCAL AND POLICY NOTE**  
**Revised**

Senate Bill 183

(Senator Middleton, *et al.*)

Education, Health, and Environmental Affairs

Ways and Means

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**Task Force to Study the Dynamics of Elderly and Retiree Migration Into and Out of Maryland**

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This bill creates a 16-member Task Force to Study the Dynamics of Elderly and Retiree Migration Into and Out of Maryland. The task force must be appointed and begin its deliberations no later than July 1, 2003 and submit a report of its findings and recommendations to the Governor and the General Assembly by December 31, 2003.

The bill is effective June 1, 2003 and terminates December 31, 2003.

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**Fiscal Summary**

**State Effect:** Minimal increase in expenditures for the University System of Maryland in FY 2004 only to conduct the study. Any expense reimbursements for task force members under the standard State travel regulations are assumed to be minimal and absorbable within existing budgeted resources. Staffing can also be provided with existing resources.

**Local Effect:** Minimal.

**Small Business Effect:** None.

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**Analysis**

**Bill Summary:** The task force is charged with reviewing the dynamics of elderly and retiree migration into and out of the State and evaluating the impact that tax policies and benefits of Maryland and other states have on such migration, as well as the benefits that

the elderly and retirees provide to the local community and the State through volunteering or other activities and State expenditures on the elderly and retirees. The task force must oversee and help prepare a comprehensive and objective study to be conducted by the Maryland Institute for Governmental Service, the Maryland Institute for Policy Analysis and Research (University of Maryland, Baltimore County), Loyola College (of Maryland), and the Regional Economic Studies Institute (RESI).

The University System of Maryland must provide staffing for the task force. The task force members may not receive compensation but are entitled to reimbursement under the standard State travel regulations. The Governor must attempt to ensure regional, economic, ethnic, and gender diversity to the extent practicable.

**Current Law:** None applicable.

**Background:** According to the Department of Aging, the number of Marylanders over the age of 60 will account for 23% of the State's population by the year 2030, compared to 15% (801,036) of the 2000 population. The number of citizens over the age of 85 is also expected to grow from 66,902 in 2000 to 127,079 in 2030. The U.S. Census Bureau predicts the geographic distribution of the State's 60+ population to remain fairly stable, with most of the elderly living in Anne Arundel, Baltimore, Montgomery, and Prince George's counties and Baltimore City.

The Maryland Institute for Governmental Service operates under University of Maryland Center for Applied Policy Studies and provides training, research, and consulting services to governments and communities. RESI, which moved to Towson University in 1996, provides management consulting, economic analysis, and research services. It is self-funded through client contracts, which include many State agencies. The Maryland Institute for Policy Analysis and Research applies scholarly research on significant issues of public policy and links university resources with policy makers in the State and region.

**State Expenditures:** The University System of Maryland advises it will incur minimal increases in expenditures due to contractual costs charged by consultants conducting the study – the actual amount will depend on the scope of the study.

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### **Additional Information**

**Prior Introductions:** None.

**Cross File:** None.

**Information Source(s):** Department of Planning, Department of Business and Economic Development, University System of Maryland, Department of Aging, Department of Legislative Services

**Fiscal Note History:** First Reader - February 18, 2003  
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