

Department of Legislative Services
Maryland General Assembly
2004 Session

FISCAL AND POLICY NOTE
Revised

Senate Bill 122

(Senator Middleton, *et al.*)

Budget and Taxation

Ways and Means

Task Force to Study the Dynamics of Elderly and Retiree Migration into and out of Maryland

This bill creates an 18-member Task Force to Study the Dynamics of Elderly and Retiree Migration into and out of Maryland staffed by the University System of Maryland. The task force must be appointed and begin its deliberations no later than July 1, 2004 and submit a report of its findings and recommendations to the Governor and the General Assembly by December 31, 2004.

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 and county 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 bill is effective June 1, 2004 and terminates December 31, 2004.

Fiscal Summary

State Effect: Minimal increase in consultant expenditures for the University System of Maryland in FY 2005 only to conduct the study. Any expense reimbursements for task force members and staffing costs can be provided with existing resources.

Local Effect: Minimal.

Small Business Effect: None.

Analysis

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 and older 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 most current data regarding migration of people aged 65 and over are from a U.S. Census study conducted between 1995 and 2000. According to that study, the net migration loss of Maryland residents aged 65 and older during that time was 4,388; 30,367 people left Maryland and 25,979 moved in. The majority of the loss involved persons aged 65 to 74. The State experienced a net migration gain for those aged 74 to 85 and those aged 85 and over.

The Maryland Institute for Governmental Service operates under the 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.

Additional Information

Prior Introductions: An identical bill (SB 183), as amended, was passed by the Senate in the 2003 session. The Ways and Means Committee heard the bill but took no action.

Cross File: None.

Information Source(s): University System of Maryland, Department of Planning, Department of Aging, Department of Legislative Services

Fiscal Note History: First Reader - February 2, 2004
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