

Data Sources and Methodology Summary for Elder Index 2011†

<i>Data Type</i>	<i>Source</i>	<i>Methods</i>
Housing	<p>Rent: US Department of Housing and Urban Development. Fair Market Rents - Fiscal Year 2009, 2010 and 2011. http://www.huduser.org/portal/datasets/fmr.html</p> <p>Owner Costs: US Census: American Community Survey 2007-2009, Public Use Microdata (PUMS data). Median selected monthly owner costs for each geographic area reported separately for owners 65+ with, and without a mortgage. http://usa.ipums.org/usa/</p> <p>Owner costs adjusted to June 2011 by CPI-U for housing in the Western region. http://data.bls.gov/cgi-bin/dsrv?cu</p> <p>Owner Costs for small counties: The 2006-2010 ACS published files in American Factfinder. http://factfinder2.census.gov/faces/nav/jsf/pages/searchresults.xhtml?refresh=t</p>	<p>Fair Market Rents (FMRs) for 1-bedroom units by county.</p> <p>Median selected monthly owner costs (SMOC) for owners 65+ with and without a mortgage.</p> <p>SMOC includes property taxes, insurance, heat & utilities, condo fees, & mortgage payment (if any)</p>
Food	<p>U.S. Department of Agriculture, Low-Cost Food Plan for 2009, 2010 & 2011:</p> <p>http://www.cnpp.usda.gov/Publications/FoodPlans/2008/CostofFoodJun09.pdf</p> <p>http://www.cnpp.usda.gov/Publications/FoodPlans/2009/CostofFoodJun10.pdf</p> <p>http://www.cnpp.usda.gov/Publications/FoodPlans/2010/CostofFoodJun11.pdf</p> <p>Per USDA, listed food costs for single adults are increased 20% to reflect lesser economies of scale; listed food costs for couples were already USDA adjusted.</p> <p>CPI for food inflation http://data.bls.gov/cgi-bin/dsrv?cu</p>	<p>Low Cost Food Plan costs for older men and women are averaged to the CA population determine food costs for single elders. ACCRA data used to adjust counties relative to national average costs. Counties w/o ACCRA data adjusted same amount as lowest cost county. 2009 and 2010 inflated to 2011 using CPI after adjustments. Final cost is average across all three years .</p>
Total Health Care Costs (premiums and out of pocket cost)	<p>Medicare Part B Premiums: http://www.cms.gov/apps/media/fact_sheets.asp</p> <p>Medicare Advantage (Kaiser, including Part D drugs) https://prospectivemembers.kaiserpermanente.org/kpweb/medicare/detailpage.do?bodyContainer=/htmlapp/feature/211medicare/ca_download_ekit.html</p> <p>Medigap (AARP supplement – Plan C, Tier II Costs) Directly from United Healthcare Contact</p> <p>Part D Prescription Drugs (AARP) Directly from United Healthcare Contact</p> <p>Out-of-Pocket Costs: Agency for Healthcare Research and Quality, Medical Expenditure Panel Survey. Household Component Analytical Tool (MEPSnet/HC). 2007, 08,& 09. Rockville, MD. Retrieved from: http://www.meps.ahrq.gov/mepsnet/HC/MEPSnetHC.asp Inflation Factor: http://data.bls.gov/cgi-bin/dsrv?cu</p>	<p>Premium costs are Part B 2011 plus</p> <p>2011 premiums for Medicare Advantage (MA) plan (Kaiser) where 20% or more of county in any MA -or- Medigap Plan (AARP) + Part D Prescription Drug Plans (AARP)</p> <p>Median out-of-pocket costs calculated for elders 65+ by health status = good, excluding those on Medicaid. Data is updated with the Medical CPI-U for the Western region.</p>
Transportation	<p>Private Automobile Cost: National Household Travel Survey (NHTS, 2009) http://nhts.ornl.gov/index.shtml</p> <p>Per Mile Cost: US Internal Revenue Service http://www.irs.gov/newsroom/article/0,,id=216048,00.html</p> <p>Public Transportation Cost: Web sites of each county public transit authority.</p>	<p>Annual mileage driven by retired adults in state x IRS standard mileage reimbursement rate for operating and owner costs for Jan 2009, 2010 & 2011.</p> <p>Cost of 30-day senior discount pass in counties with significant public transit systems.</p>
Miscellaneous	<p>Miscellaneous expenses are estimated at 20% of costs of other basic expenditure categories: housing, food, health care, and transportation, which is equal to 16.67% of total expenses. Includes all other essentials: clothing, shoes, paper products, nonprescription medicines, cleaning products, household items, personal hygiene items, and telephone.</p>	<p>Miscellaneous expenses for owners without a mortgage, and applies that amount to each of the housing types.</p>

†Preliminary costs for EI 2011. Costs and methods for housing and out of pocket health care will vary slightly once ACS for 2011 is released in December and MEPS 2010 is available online in November.