

Caseload Allocation**Policy No. CM- 710.01**

Effective date: October 1, 2016

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Policy

For each federal fiscal year (FFY) beginning October 1, Georgia WIC shall assign Local Agency WIC programs their set participation caseload levels. Caseload assignments and funding will be allocated based on current year participation caseloads as of March of the current fiscal year by one of two options described in the procedures section of this policy.

Purpose

To inform local agencies of the methodology used to assign participation caseloads and FFY allocations

Procedures

- I. The State WIC Office (SWO) uses two (2) methodologies for assigning FFY participation caseloads and allocations.
 - A. Both methodologies use the current FFY four-month closeout, one month (30) day and one month (issue) their new assigned target.
 - B. Option A – local agencies meeting or exceeding their current caseload targets using the current FFY four month closeout, one month (30) day and one month issued participation caseloads will be assigned a new target using their highest one-month participation during this period.
 - C. Option B – local agencies failing to meet their current caseload targets will be assigned a new target equaling a six-month average of the current FFY four month closeout, one month (30) day and one month issued participation caseloads.
 - D. These caseloads will be used to determine each local agency's pro rata share of the statewide caseload established by the SWO after projecting for a reasonable statewide target for the next FFY.
- II. Upon analysis of projected next FFY Nutrition Services and Administration (NSA) funding and projected needs, remaining NSA available for allocation to local agencies will be determined. The amount will be the initial funding to be allocated to the local agencies.
- III. The local agency allocation will be calculated as follows:
 - A. $\text{Initial funding} \div \text{statewide caseload} \div 12 \text{ months} = \text{Rate}$
 - B. $\text{Local agency caseload} \times \text{Rate} \times 12 \text{ months} = \text{local agency allocation}$
- IV. SWO may make additional NSA funds available for local agency allocation as requested or necessary. These allocations will not result in an increase in the current assigned caseloads.

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- V. Participant Cost Adjustment – SWO may assess local agencies a participant cost adjustment for agencies failing to meet their assigned caseload in the current fiscal year. The assessment (decrease) will be calculated as follows:
- A. Calculate current 6 month average participation caseload by averaging the current FFY four-month closeout, one month-30 day and one month (issue).
 - B. Calculate the difference between the assigned caseload and the 6 month average caseload.
 - C. Multiply the difference calculated in B. by the initial rate calculated in step III. and multiply this amount by 12 months.
 - D. This calculation is stated as: $(\text{Assigned Caseload} - \text{Current 6 month}) \times \text{Rate} \times 12 \text{ months}$.
 - E. For local agencies exceeding their Assigned Caseload, a Participant Cost Adjustment (increase) will be allocated in the next FFY after closeout calculated as follows: $(\text{Final Caseload} - \text{Assigned Caseload}) \times \text{Prior Year Rate} \times 12 \text{ months}$. These Adjustments will be made based upon the availability of NSA funds and at SWO discretion.

Authority

7 CFR § 246.4(a)(13);
7 CFR § 246.16(c)(2)(i)

Definitions/Supporting Information

(None)