



Report to the Commissioners
Area IX Agency on Aging, Flathead County
May 19, 2014
 Prepared by Lisa Sheppard, Director

Below are two tables, one for performance measures and one for workload indicators, showing FY 2013 actuals, FY 2014 targets, March-April 2014 totals and fiscal year-to-date totals. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

The general target is 83.33%, keeping in mind that some numbers will be unevenly distributed throughout the year.

MEASURE	FY 2013 Actuals	FY 2014 Target	March-April 2014	Total Last Report	Total/Avg. to Date	% Target
# Receiving Independent Living Services	317	350	42	253	295	84%
# Receiving Meals on Wheels	349	373	54	352	406	109%
# of Seniors Receiving Congregate Meals	817	832	77	737	814	98%
# of Eagle Transit Dial-A-Ride Customers	368	470	44	636	680	145%
# of RSVP Volunteer Hours	40,468	32,000	3573	33,249	36,822	115%
# of Public Outreach/Education/Media Efforts	35	48	11	53	64	135%
% of Ind. Liv. Recipients/Intake at Moderate to High Risk of Institutionalization	N/A	70%	not yet available	84%	84%	120%
Per Meal Cost of Nutrition Services	\$6.08	\$6.00	\$5.86	\$5.91	\$5.91	99%
% of Annual Survey Respondents Who Indicate Overall Satisfaction with AOA Services	N/A	90%	N/A	N/A	N/A	N/A
Maximum # of Public Complaints About Transportation Services (5 per month, no more than 60 annually)	N/A	60	2	15	17	28%

WORKLOAD INDICATOR	FY 2013 Actuals	FY 2014 Target	March-April 2014	Total Last Report	Total/Avg. to Date	% Target
Nutrition						
Meals Served	76,893	78,000	15,399	55,389	70,788	91%
# Nutritional Assessments Conducted	not available	560	not yet available	300	300	54%
Transportation - March only						
Total Ride Count	93,833	96,000	8,405	60,634	69,039	72%
Dial-A-Ride Count	34,083	40,320	not yet available	20,331	20,331	50%
City, Commuter and Other Ride Count	59,750	55,680	not yet available	40,351	40,351	72%
Information and Referral - March only						
Outreach, Info and Referral Contacts	15,896	16,300	1,404	12,334	13,738	84%
Independent Living						
Homemaker Units of Service	3,318	3,780	510	2,042	2,552	68%
Escorted Transportation Units of Service	1,845	1,768	458	1,337	1,795	102%
Respite Units of Service	2,742	2,932	341	1,534	1,875	64%
Community Support Units of Service	N/A	N/A	123	229	352	N/A
Medicare/Insur. Counseling Units of Service – March only	1,793	1,300	129	1438	1,567	121%
RSVP						
Volunteers Recruited/Enrolled	493	500	8	488	496	99%
Volunteer Work Stations Developed and Maintained	59	60	4	83	87	145%
RSVP Newsletters Produced and Distributed	4	6	2	4	5	83%

AOA Administration

Budget

- FY 2014: Admin staff are in the process of revising the FY 14 DPHHS contract budget based on recent instruction from DPHHS regarding additional funding and other changes in allocations; final revisions to AOA's FY 14 county budget will be made accordingly at a later date
- FY 2015: County Administrative budget review held on 4/14 and Commissioner review on 5/13/14. FY 2015 DPHHS contract budgets are due at the end of May.
- We are requesting Commissioner approval to purchase a new vehicle before the beginning of the new fiscal year. We are short one vehicle and are having difficulty meeting staff needs for transportation on county business. The money is available in CIP and Finance has okayed the purchase pending commissioner approval.

State/Legislative Issues

- M4A: Along with two other Area Agency directors, Lisa met with DPHHS Director Richard Opper and other senior DPHHS staff to discuss aging services funding needs and priorities for the upcoming legislative session in January 2015.
- Lisa Sheppard, AOA Director, and J.R. Isles, Nutrition Manager, participated in a community forum meeting on 3/21/14 to discuss challenges and legislative priorities related to long term care.
- Area Plan: We have begun to gather information for the next Area Plan, which will cover October 2015-September 2019. As part of the process, we are working with a volunteer consultant to help us develop and implement program specific surveys and interviews.

Building

- **New building:** Lisa has been participating in discussions with county administration regarding the south campus option.
- **Kelly Road:** Pat McCarthy from PayneWest Insurance performed an annual walk-through of the building in January and submitted a report in February addressing progress and continuing challenges regarding safety and functional issues since his review in February of 2013.

Advisory Council

- The AOA Advisory Council met on 4/10/2014. There was no Finance Committee meeting held in April. The meetings were canceled for May due to staff and council member participation in the Governor's Conference on Aging, May 6-7 in Kalispell.
- The primary topic discussed at the April meeting was the status of preparation for the Governor's Conference and final steps needed leading up to the event.

Governor's Conference on Aging – May 6-7, 2014 in Kalispell at the Red Lion Hotel

- Updated AOA web page on County website with Governor's Conference information – thanks IT!
- The conference was a huge success!
 - There were approximately 280 people in attendance on day one and 230 on day two. Final numbers will be available in the June report.
 - Governor Steve Bullock honored 14 local centenarians at the luncheon on day one
 - On day two, AOA honored four individuals who have contributed to the agency's mission and who embody the theme of "Inspired Aging": Commissioner Cal Scott; Diane Queen Miller, producer of KGEZ's morning show; Millie Nielsen, long-time RSVP volunteer; and Polly Nikolaisen, senior advocate and former AOA Director
 - More than 25 vendors participated in the onsite resource fair.
 - The conference was made possible by the financial support of the many sponsors, vendors and advertisers. Major sponsors included: Kalispell Regional Healthcare, North Valley Hospital, Immanuel Lutheran Communities and Conservator Corporation of Montana.
 - Written evaluations collected by DPHHS were all very positive.

Outreach/Education/Media - Increased outreach is a goal in our Area Plan on Aging (Oct. 2011- Sept. 2015)

- On 3/31/14, Lisa was a featured speaker on the KGEZ morning show. Lisa is scheduled for a regular spot on the morning show the first Monday of every month at 7:20.
- On 4/4/14, Lisa spoke about the Governor's Conference and other happenings at AOA at the Columbia Falls potluck lunch.
- The March and April additions of the Whitefish Community Center newsletter, The Golden Gazette, featured articles on the Governor's conference.
- April/May issue of Montana Senior News:
 - Article on Governor's conference

- Ad for AOA services
- Ad for Eagle Transit
- RSVP:
 - In February, staff briefly presented on RSVP at a veteran's Training course at FVCC (approximately 50 in attendance)
 - Staff presented at ASSIST training in March (approximately 7 in attendance)
 - On 3/18/14, advisory board member Jerry O'Brien was featured on KGEZ talking about RSVP and the benefits of being a member
 - Staff participated in the United Way Share Fait at Kalispell Center Mall on 4/5/14

Eagle Transit

- The annual United Way application was submitted in March and a presentation was made to the Citizens' Review Board on May 14, 2014. We requested \$10,000 to assist with match funding for a new bus.
- The Eagle Transit Advisory Committee (TAC) met on 4/3/14. Topics included the United Way application, Title VI requirements, FY 14 and FY 15 budgets, the maintenance plan, RouteMatch issues and a review of the draft of proposed bylaw changes.
 - Lisa submitted the proposed bylaw changes to Tara Fugina in the County Attorney's office and has revised them based on her recommendations. The new version has been emailed to TAC members for review. The Committee did not meet in May because of the Governor's Conference and so will approve final recommendations at the meeting on June 5, 2014, which will then be sent to the Commissioners for action.
 - Guest speaker at the June meeting will be Jim Foster, Chief of Facilities Management at Glacier National Park.
- We have finalized plans to use the additional \$27,000 in New Freedom funds to expand service hours in Whitefish and Columbia Falls starting in mid-June. The Montana Department of Transportation (MDT) has approved carry-over of the unspent funds into FY 15.
- We completed and submitted the 3rd quarter report to MDT at the end of April.
- Lisa and Transportation Manager Jim Boyd met with MDT staff on 4/30 to discuss continuing problems with RouteMatch. They will assist us to get the issues resolved.

Nutrition

- Educational materials and the "Senior Scoop" are sent out monthly to all Meals on Wheels and nutrition sites (approximately 300 recipients). Recent topics include: how to avoid scams aimed at seniors, guidelines for protein intake, and nutrient rich snack foods. We also distributed voter registration applications the first week of May.
- The Nutrition Committee met on 3/18/14. Main topic of discussion was the increase in MOW requests, especially in Olney and Hungry Hors/Coram, and exploring options to obtain more fresh produce.
- Staff sent out annual nutrition survey. Results available in June report.
- Staff participated in training on low sodium diets, and J.R and baker Stephanie Leite attended a food show in Spokane in April.

I & R/Assistance

- AOA staff have updated client information in the new database that did not export from the old system. We are now working with IT to complete the needed reports.
- We have hired a new Community Outreach Coordinator. Welcome Christine Neater!
- Our current contractor for Independent Living services does not plan to renew their contract with us for FY 15, so we are in the process of transitioning to three new providers and are taking the opportunity to make some changes in how we implement these services. This is a time intensive effort and will be a major focus for staff over the next months.

- The Lifeside Farm (previously Care Farm) and Pickleball were highlighted at the Governor's Conference.

RSVP

- The annual United Way application was submitted in March and a presentation to the Citizens' Review Board was made on 5/14/14. We have requested \$10,000 to help with volunteer recognition and to meet match requirements.
- RSVP grant and financial reports for the last quarter have been submitted.
- All funds for the grant period ending March 31, 2014 have been requested and received.
- The RSVP Advisory Board met on 3/19/14 and 4/16/14.
- A volunteer opportunities notice was distributed to 300 people in March and the RSVP newsletter went out 4/1/14.
- Staff are participating in the Hunger Group (formerly called the New Group), the Flathead Valley Homeless Youth group and the Veterans' Service Provider Group with a focus on how to incorporate RSVP volunteers into the ongoing efforts to address these community issues.
- The Winter Ready Program and Cribbage were highlighted at the Governor's Conference.

Senior Mobile Home Repair

- Advisory Board meetings were held 4/8/14 and 5/13/14.
- 1 project was completed in April.
- 10 projects are in progress.
- Funding:
 - \$1500 was awarded from Flathead Electric/Roundup for Safety.
 - The Kalispell Rotary has been awarded a \$2500 district grant to benefit the program, which when combined with matching funds from the club will total \$5000.
- The program was highlighted at the Governor's Conference.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Whitefish: The Whitefish Summer Solstice Bluegrass Bash fundraiser will be held on Saturday June 21st at the Community Center. Tickets are on sale now. Adults \$20 and children \$10. The Center has "embarked" on an effort to get seniors engaged in the community called "Out and About Tours". The next one will be this week, 5/21 to Applied Materials. Innovative efforts at the Center were highlighted in the Governor's Conference materials.
- Kalispell: Office Manager Khit Harding has a regular spot on KGEZ. The house is now ready for rent. The Center hosted a "Business Partner and Volunteer Helpers" award dinner on April 26th. The next general meeting and potluck is 5/29/14 at 5:00 pm..
- Columbia Falls: The 3/21 pancake supper to help raise funds for a new freezer was a big success. The Center has a noon potluck the first Friday of every month.

Story: We Love Our Jobs! - The staff at AOA and Eagle Transit are dedicated, hard-working and most importantly passionate about our mission. And apparently it shows. Not long ago we heard through the grapevine that another county employee was overheard encouraging someone to apply for an open position at AOA, saying, "Everyone there loves their job." Now that's the kind of rumor I like! I must admit it made me grin from ear to ear, but it also made me reflect on what it's like to work at AOA. It is certainly easy to get overwhelmed with the demands of the job – there is never enough time or resources (and sometimes good humor) to do everything that needs to be done. But that being said, every single day our employees have the opportunity to help someone, or many someones, and to make our community a better place – and they so clearly value that opportunity. You can hear them talk about in the hallways, and it is the context for all of our conversations about our work. Every complaint about the "grind" is either prefaced or followed by some version of "but this is important work." We do indeed love our jobs. Thank you for letting us do them!