



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**August 19, 2013**  
 Prepared by Lisa Sheppard, Director

This is the first report that includes information on AOA's new performance measures for Fiscal Year 2014 (July 2013-June 2014). Below are two tables, one for performance measures and one for workload indicators, showing FY 13 actuals, FY 2014 targets, July 2013 totals, and fiscal year-to-date totals. As these numbers represent work in the first month of the fiscal year, the year-to-date totals are the same. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. We are working on more thorough and accurate reporting as well as collecting additional data to assist us in planning for and managing our programs.

**Performance Measures and Workload Indicators**

<b>MEASURE</b>	<b>FY 2013 Actuals</b>	<b>FY 2014 Target</b>	<b>July 2013</b>	<b>Total Last Report</b>	<b>Total/Avg. to Date</b>	<b>% Target</b>
# Receiving Independent Living Services	317	350	127	N/A	127	36%
# Receiving Meals on Wheels	349	373	185	N/A	185	50%
# of Seniors Receiving Congregate Meals	817	832	405	N/A	405	49%
# of Eagle Transit Dial-A-Ride Customers		470	298	N/A	298	63%
# of RSVP Volunteer Hours	40,468	32,000	Sept. report	N/A	Sept. report	
# of Public Outreach/Education/Media Efforts	35	48	7	N/A	7	15%
% of MOW/Ind. Liv. Recipients at Moderate to High Risk of Institutionalization *	N/A	70%	78%	N/A	78%	
Per Meal Cost of Nutrition Services	Sept. report	\$6	Sept. report	N/A	Sept. report	
% of Annual Survey Respondents Who Indicate Overall Satisfaction with AOA Services	N/A	90%	N/A	N/A	N/A	
Maximum # of Public Complaints About Transportation Services per Month (no more than 60 annually)	N/A	5	2	N/A	2	

\* Based on staff assessment using "at-risk" matrix

WORKLOAD INDICATOR	FY 2013 Actuals	FY 2014 Target	July 2013	Total Last Report	Total/Avg. to Date	% Target
<b>Nutrition</b>						
Meals Served	76,893	78,000	6,797	N/A	6,797	9%
# Nutritional Assessments Conducted		560	63	N/A	63	11%
<b>Transportation</b>						
Total Ride Count	93,469	96,000	7,152	N/A	7,152	7%
Dial-A-Ride Count		40,320	2,581	N/A	2,581	6%
City and Commuter Ride Count		55,680	4,571	N/A	4,571	8%
<b>Information and Referral</b>						
Outreach, Info and Referral Contacts		16,300	1,639	N/A	1,639	10%
<b>Independent Living</b>						
Homemaker Units of Service	3,318	3,780	262	N/A	262	7%
Escorted Transportation Units of Service	1,845	1,768	137	N/A	137	8%
Respite Units of Service	2,742	2,932	212	N/A	212	7%
Community Support Units of Service	N/A	N/A	34	N/A	34	
Medicare/Ins. Counseling Units of Service		1,300	257	N/A	257	20%
Monthly Ombudsman Visits	19	19	21	N/A	21	
<b>RSVP</b>						
Volunteers Recruited/Enrolled	493	500	342	N/A	342	68%
Work Stations Developed/Maintained	59	60	59	N/A	59	98%
Newsletters Produced and Distributed	4	6	0	N/A	0	0%

## AOA Administration

### *Budget*

- FY 2013: In process of preparing revised and final financial reports for DPHHS
- FY 2014:
  - We are working closely with Finance to accurately account for Glacier National Park revenue and expenses relative to the close out of FY 2013 in fund 2990 (Transportation) and the beginning balance in FY 2014 in the newly created GNP fund 2996. We anticipate a remaining fund balance in Transportation of 23-25% after adjusting for the change in the method for recording advance revenue from the Park.
  - We are still waiting to hear about additional federal cuts.

### *State/Legislative Issues*

- **Community First Choice Committee:** Lisa will attend the next meeting in Helena on 9/20/2013 to review the CFC State Plan Amendment and begin work on implementation.
- **M4A:** Lisa participated on the monthly M4A call on 7/24/2013. Lisa and Kathi will participate in the quarterly M4A meeting in Havre 8/27-28/2013.

### ***Building***

- **New building:** Nothing to report.
- **Kelly Road:** Nothing to report.

### ***Advisory Council***

- The Council is not meeting in August as many members are volunteering at the RSVP Senior Rest Area at the Fair. The next regularly scheduled meeting is on 9/12/2013.

### ***Strategic Planning***

- Strategic planning efforts will resume in September.

### ***Research and Program Evaluation***

- We are wrapping up our participation in a study by the U.S. Administration on Community Living on the effectiveness of different approaches to service provision to inform better delivery of long-term services and supports (LTSS).
- Area IX clients are in the process of being contacted to participate in the U.S. Department of Health and Human Service's Eighth National Survey of Older Americans Act Participants in coordination with the Montana DPHHS.

### ***Staff Development***

- HR conducted FMLA training for AOA/Eagle Transit staff on 8/5/2013.

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

- Interlake reported on the inclusion of the project in the approved CIP on 7/1/13.
- New radio ads for Eagle Transit services began on 7/1/2013 on multiple stations.
- On 7/2/2013, Lisa was interviewed by Fox News about the inclusion of the new building in the CIP.
- On 7/22/2013, Lisa presented about AOA services to the local Association of American University Women. Approximately 35 people were in attendance.
- On 7/25/2013, Dave Polansky, Transportation Manager, presented about Eagle Transit services to the Veterans provider group. Approximately 30 people were in attendance.
- On 7/25/2013, Lisa presented at the Kalispell Senior Center general meeting. Approximately 22 people were in attendance.
- On 7/30/2013, the Daily Interlake reported on Plum Creek's \$2000 donation to the Senior Mobile Home Repair program, highlighting program recipient Bertha Myers.
- Software for AOA that will allow us to post statistics, reports, menus, I&R info, newsletters and other items on the AOA page on the county website has been installed and IT began training staff in its use on 7/12/13.

### **Eagle Transit**

- A.T. Stoddard from LSC Transportation Consultants presented the draft of the Five Year Transit Development Plan to the Commissioners on 8/8/2013. Recommendations for immediate implementation were eliminating Saturday service (will take effect 10/1/2013), modifying the Kalispell-Evergreen city bus routes to run north/south and east/west with a transfer point in downtown Kalispell, and increasing service hours on the Whitefish and Columbia Falls city routes. Intermediate and long-range recommendations were also presented, including the establishment of an urban transportation district.
- Glacier National Park cooperative agreement:
  - As of 7/31/2013 the shuttle service had provided 72,061 this season, which is up approximately 10,000 rides up from this time last year.
  - The Park Operations Lead position is open. We are in the process of modifying the job description and plan to post the position shortly. Jim Boyd, Eagle Transit Operations Lead, is overseeing shuttle operations along with the contracted supervisor, Sharon Bengtson.

- We have negotiated an admin fee for the agreement of \$17,743 annually. Half of this amount will be applied to the current agreement; the full amount will be added to the budget for next year.
- The Eagle Transit Board took its annual trip to the Park on 8/1/2013.
- We invite the Commissioners to visit the Park, see the shuttle operation firsthand (if possible) and meet with Park management.
- The MDOT audit concluded last week. Results were overall very positive with the exception of one finding of overcharge to MDOT of approximately \$3000. No decision yet on whether repayment will be required.
- Human Resources:
  - Dave Polansky, Transportation Manager, has submitted his resignation. His last day will be August 31, 2013. **Thank you to Dave for his service and well wishes for his future!**
  - Ernie McIntyre took 3<sup>rd</sup> in the best driver category in Best of the Flathead. **Congratulations Ernie!**
  - Two new drivers have been hired.
  - In process of conducting an analysis of FTEs to route hours to determine personnel needs.

### Nutrition

- Educational material on summer food safety was distributed to all Meals on Wheels recipients
- Walmart in Kalispell donated \$5000 to Meals on Wheels and presented us with a check on 8/16/2013. This is a Walmart employee initiated grant. **Big thanks to Kalispell Walmart employees for choosing MOW!**

### I & R/Assistance

- We are now including the Care Farm program as a regular service option.
- DPHHS has agreed to provide us with additional funding for a half-time Ombudsman position, which we hope to be able to post this week.

### RSVP

- Grant update:
  - Amy Busch, State Program Specialist, conducted a compliance review of the RSVP program 7/24-26/2013. She was very positive about the program and the changes that Program Director Sue Holst has put in place. She will prepare a formal report shortly, which will be sent to you for review. **Thank you to Commissioner Holmquist and Mike Pence for visiting with Amy about their perceptions of the program and how it can best meet the needs in Flathead County.**
  - Upon learning that we have recently entered into a collaborative effort with the ASSIST project to reduce local hospital readmissions through one-on-one volunteer support post discharge, **Amy is facilitating our application for an additional \$100,000 CNCS grant available to sites that are focusing on that issue as well as health-care access, enrollment, outreach, and education.** The turn-around time is short. We will submit the grant within the next couple of weeks and could be funded as early as September. If awarded, we will have until March 2015 to expend the funds.
- The RSVP Advisory Board did not meet in July as the date conflicted with the state compliance review.
- RSVP again hosted the senior rest area at the Fair (Wed.-Sat.) with Board members taking a leadership role. The area offered seniors and their families a shady spot to sit, visit, partake of donated refreshments and buy discounted rodeo tickets. On Thursday, which was Senior Day, approximately 100 people per hour were served. **Great job Sue and Leslie and many thanks to RSVP Board!**
- The annual Volunteer Recognition banquet will be held on 9/10/13.

### Senior Mobile Home Repair

- The Advisory meeting was held 8/13/2013.
- Twenty projects are in progress. **58 projects were completed in FY 2013, which is more than double what was done in any previous year.**
- Funding: \$2000 received from Plum Creek; still awaiting word on \$3,500 from BNSF

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

- Lisa and J.R. attended the potluck at North Valley Senior Center on 8/2/2013.
- Nutrition Manager, J.R. Isles, participated in the grand opening of the Lakeside Senior Center.
- Lisa and Kathi met with North Valley Senior Center Board members on 8/6/2013 to discuss funding for this fiscal year and are scheduled to meet with all Senior Center Board reps this afternoon at the Kalispell Senior Center to discuss budget and contract issues.

**Story: “Information and Referral” a Misnomer – Really “Hands-On Guidance and Personal Support”**

AOA Information and Referral staff assist seniors with a wide variety of concerns and questions. Sometimes the help is simple - a phone number, a brochure, an explanation – but most often our task is to guide someone through what can be a complex and daunting maze of services. By walking hand and hand with them every step of the way we can ease their anxiety and better ensure they get the help they need.

Recently, Peggy Colby, who is part of our Information and Referral team, was able to help “JoAnn” successfully navigate the Social Security disability process. JoAnn is a seamstress by trade but has not been able to work for over 2 years as her fingers, hands and arms have been severely damaged from working with fiberglass material. She also suffered a head injury, which has impaired her memory, and experiences significant chronic back pain but has been unable to afford to seek medical diagnosis and treatment. Peggy was able to help JoAnn complete the Social Security disability forms, accompany her during the interview process, and follow-up as necessary, which was critical given her physical limitations and memory loss. JoAnn was awarded disability and Medicare coverage within 8 months, and we were able to help her enroll in a health plan. JoAnn now has insurance for the first time in many years. She can afford to go to the doctor for her back and pay for her prescriptions. She has expressed overwhelming gratitude for our assistance. For our part, we are thrilled with the outcome but consider it all a part of a day’s work.