



Report to the Commissioners

Area IX Agency on Aging, Flathead County

September 16, 2013

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, August 2013 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.

Performance Measures and Workload Indicators

MEASURE	FY 2013 Actuals	FY 2014 Target	August 2013	Total Last Report	Total/Avg. to Date	% Target
# Receiving Independent Living Services	317	350	33	125	158	45%
# Receiving Meals on Wheels	349	373	31	185	216	58%
# of Seniors Receiving Congregate Meals	817	832	57	405	462	56%
# of Eagle Transit Dial-A-Ride Customers	368	470	85	298	383	81%
# of RSVP Volunteer Hours	40,468	32,000	not yet available	N/A	0	
# of Public Outreach/Education/Media Efforts	35	48	4	7	11	23%
% of MOW/Ind. Living Recipients at Moderate to High Risk of Institutionalization	N/A	70%	82%	78%	82%	117%
Per Meal Cost of Nutrition Services	\$6.08	\$6.00	\$3.18 - July	N/A		
% 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	not yet available	2	not yet available	

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

WORKLOAD INDICATOR	FY 2013 Actuals	FY 2014 Target	August 2013	Total Last Report	Total/Avg. to Date	% Target
Nutrition						
Meals Served	76,893	78,000	6,990	6,797	13,787	18%
# Nutritional Assessments Conducted	not yet available	560	not yet available	63	not yet available	
Transportation						
Total Ride Count	93,928	96,000	6,977	7,310	14,287	15%
Dial-A-Ride Count	not yet available	40,320	2,789	2,744	5,533	14%
City and Commuter Ride Count	not yet available	55,680	4,188	4,566	8,754	16%
Information and Referral						
Outreach, Info and Referral Contacts	not yet available	16,300	not yet available	1,639	not yet available	
Independent Living						
Homemaker Units of Service	3,318	3,780	255	262	517	14%
Escorted Transportation Units of Service	1,845	1,768	139	137	276	16%
Respite Units of Service	2,742	2,932	191	235	426	15%
Community Support Units of Service	N/A	N/A	33	15	48	
Medicare Counseling Units of Service	not yet available	1,300	not yet available	257	not yet available	
Monthly Ombudsman Visits	19	19	not yet available	21		
RSVP						
Volunteers Recruited/Enrolled	493	500	not yet available	342	not yet available	
Volunteer Work Stations Developed and Maintained	59	60	not yet available	59	not yet available	
RSVP Newsletters Produced and Distributed		6	1	0	1	17%

AOA Administration

Budget

- FY 2013: Admin staff continue to work with finance to close out FY 2013 transactions. Once that is complete, staff will complete the revisions of the final financial reports for DPHHS.
- FY 2014:
 - We are in the process of revising FY 14 estimates based on FY 13 actuals and anticipate requesting a budget amendment to address any changes needed.
 - Charlie Rehbein, Montana Aging Services Bureau Chief, has alerted us that there is a possibility of a 7-9% cut in FY 14 federal funds. This is not a given or necessarily a likelihood. We should know

more in October. We will prepare a budget scenario based on the 7-9% cut and will take it into account in decisions regarding current operational expenses.

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 was unable to attend the quarterly M4A meeting in Havre on 8/27-28/2013.

Building

- **New building:** Nothing to report.
- **Kelly Road:** We are exploring ways to accommodate new staff likely to be hired in the next few months.

Advisory Council

- The Finance Committee and Council met on 9/12/2013.
- Members discussed budget and program updates, by-laws revisions, upcoming wellness screenings at the senior centers and the possibility of creating a partner 501(c)(3) nonprofit to handle donations and engage in fundraising.
- A Planning Committee was formed to work on the Governor's Conference on Aging to be hosted by AOA in May 2014.

Research and Program Evaluation

- We have completed 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). We will report on results as soon as they are available.
- Area IX clients continue to be 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.

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

- On 8/6/13, Lisa presented about AOA services to the Kalispell Lions' Club, approximately 23 in attendance.
- On 8/9/13, The Daily Inter Lake reported on scams targeting seniors. Ruth Pomeroy, SHIP/SMP counselor and RSVP volunteer contributed to the article.
- On 8/16/13, Ruth was interviewed on KGEZ about Medicare fraud and other scams targeting seniors.
- Lisa presents info on AOA weekly to a local chapter of BNI.
- Staff are in the process of putting together info to update the AOA web pages.

Eagle Transit

- Glacier National Park cooperative agreement: Eagle Transit and GNP staff completed the post-season review on 9/12/13.
 - Total ridership on the shuttles was 150,622 (111,031 west and 39,591 east), up almost 9% from 138,398 in 2012.
 - The busiest day of the season was 7/31/13.
 - The daily ride average was 2,353 (1,734 on the west side and 619 on the east side).
- The Transportation Advisory Board met on 9/5/13. Members discussed and approved the proposed job description for the Transportation Manager position.
- Human Resources:
 - Jim Boyd, Eagle Transit Operations Lead is acting as Interim Transportation Manager and will do so until the position is permanently filled. The Commissioners approved the revised Transportation Manager job description and posting on 9/12/13. We will post the position within the next week or so in multiple forums for a total of 4 weeks.

- The Park Operations Lead position has not yet been filled. We anticipate posting this position shortly as the Park Lead also works at Eagle Transit during the off-season.

Nutrition

- The number of individuals requesting frozen meals has increased significantly in the last couple of months. Frozen meals are offered to those who need weekend meals or who live in areas too remote for hot meal delivery.
- Nutrition Manager J.R. Isles will participate in the Earthquake preparedness tabletop exercise on 9/20/13.

I & R/Assistance

- Commissioners approved posting the half-time Ombudsman position, which closes tomorrow.
- Medicare open enrollment begins October 15, 2013 and runs through December 7, 2013. AOA staff and volunteers will offer Medicare counseling by appointment at Kelly Road and the senior centers.
- Additional client data:
 - 35% are rated at the highest risk of institutionalization in at least one category.
 - 69% are at a high overall risk of institutionalization.
 - 71% live alone (in comparison, 27.5% of all seniors in Montana live alone)
- IT has completed a “draft” of our new database and it should be available shortly for testing. **Thanks IT!**

RSVP

- Grant update:
 - **We have completed and submitted our application for an additional \$100,000 CNCS grant to address local needs related to health care access and to increase supports to help seniors age in place.** We anticipate a decision by the end of this month. If awarded, we will have until March 2015 to expend the funds. Efforts will focus on outreach and education regarding health care and insurance options, connecting people to community-based services (with an emphasis on veterans), reducing hospital readmissions, enhancing telephone reassurance services, and supporting innovative respite and companion care services.
- The RSVP Advisory Board met on 8/29/2013. Members discussed the new grant opportunity, debriefed the rest area at the Fair and confirmed final plans for the Annual Volunteer Appreciation Banquet.
- The banquet was held on 9/10/13 (details in next month’s report).

Senior Mobile Home Repair

- The Advisory meeting was held 9/10/2013.
- One project was completed. Four are nearing completion. Two are approved and ready to begin. Thirteen projects are approved but awaiting funding
- Funding:
 - BNSF request for \$3500 must be resubmitted
 - An application for \$10,000 has been submitted to the Sportsman Ski Haus Foundation

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

- Lisa participated in the Quarterly Senior Center Board Presidents’ meeting on 8/19/13
- Kathi Kallis, Office Administrator, provided budget information to the North Valley Senior Center Board on 9/5/13.
- The Whitefish Community Center held its annual Oktoberfest fundraiser on 9/15/13.
- Russ and Jean Penne celebrated their 60th wedding anniversary at the Kalispell Sr. Center on 9/15/13.

Story: Compassionate and committed direct care staff are the backbone of aging services

AOA contracts with Agape Home Care to provide Independent Living Services. Below is a profile of one of their very valued employees, Virgil Rhodes, who provides Escorted Transportation (an AOA service) to seniors who can no longer drive and don't have other transportation options.

We often take for granted the many hard-working and kind-hearted people who provide services to our loved ones (many of whom are also our most vulnerable citizens) every single day. Sharing Virgil's story is our way of putting a face on the many special paid caregivers who make it possible for seniors to maintain their independence.

From Inga Lake, CFO of Agape Home Care, Inc.:

September 13, 2013 will mark Virgil Rhodes' one year anniversary as an employee with Agape. Virgil was hired by the agency to fill a very specific need. His primary function is providing escorted transportation for clients who otherwise aren't able to make it to their doctor appointments. Virgil escorts clients to upwards of 30 appointments per week. It is not uncommon for Virgil to log over 350 miles a pay period. Three days a week Virgil drives multiple clients to and from their dialysis appointments. His shifts often start before 5:30 in the morning. Virgil consistently works six days a week, sometimes seven. Virgil is a Montana native. His family has been in the Flathead for 75 plus years. Virgil's grandpa, John Rhodes, had a small farm in the West valley area where he grew apples and taught neighborhood kids how to milk cows. Rhodes Draw is named after Virgil's family. Virgil enjoys spending extra time with his wife and sons. Their favorite activities include going to stock car races and rodeos. He also gives back to the community during the holidays by dressing up as Santa Claus and visiting area nursing homes. Virgil is an accommodating, attentive employee. His caring nature shines in every transport he makes. We are truly lucky to have him as part of our Agape family.