



Report to the Commissioners
Area IX Agency on Aging, Flathead County
December 21, 2015
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On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2014 actuals

FY 2015 annual targets

FY 2015 actuals

FY 2015 actuals as a percentage of annual targets

FY 2015 actuals as a percentage of FY 2014 actuals

FY 2016 actuals

FY 2016 annual targets

FY 2016 actuals as a percentage of FY 2016 annual targets

The general target is 41.66% for FY 2016, July 1-November 30, 2015, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and/or volunteer reporting and some will change during the end of the fiscal year reconciliation process. 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.

Data to note:

- Since I did not make an in-person report in November, the “Total Last Report” column includes both October and November data.
- Information and Assistance contacts are up due to a combination of better tracking and increased outreach related to the Benefits Enrollment Center grant.
- We continue to monitor and adjust expenditures related to Independent Living services. We had planned to spend approximately 1/5 of the reserves in this fund in FY 2016, but we exceeded the client estimate at the beginning of the year, which put us on track to spend as high as 1/3 of the reserve. To mitigate the higher than expected expenditures early in the year, we have implemented a waiting list for all IL services and are in the process of adjusting service levels for current clients. We have eliminated homemaker services for all but a few clients, prioritized Escorted Transportation clients who need the service for dialysis and other critical medical treatment and prioritized Respite and Personal Care clients who without the services are at a high risk of institutionalization. Senior Companion funds are primarily used to support Care Farm clients. The use of this service naturally declines in the winter months. There are currently 59 people on the waiting list, most of whom are those whose homemaker services were temporarily suspended. The waiting list does not apply to meals, Medicare and benefits counseling, or information and referral services.
- Transportation rides overall are down 12% from this time last year and are 3% off the annual target as a whole. The cancellation of the July 4th fireworks in Whitefish had a significant impact on our summer numbers. However, rides for this November are up by 574 rides over November of last year, which we hope is the start of an upward trend. We are looking at ways to increase ridership, including the implementation of the new commuter loop out of Bigfork and Lakeside/Somers, expanded hours in Columbia Falls, installation of bus stop signs in the spring, improving on-time performance on the Kalispell

city routes, exploring Kalispell city route changes to decrease the time passengers spend on the bus, revamping the website by the end of the fiscal year and increasing advertising through multiple formats.

AOA Administration

Budget and Contracts

- Staff participated in the annual audit.
- We will request budget amendments in January primarily to account for the award of the Benefits Enrollment Center grant at the beginning of the fiscal year and adjustments to the Eagle Transit budget related to the reduction in the value of the county mill.
- An amendment to our DPHHS contract allowing us to bill Medicaid for certain tasks will be ready shortly for Commissioner review and signature.

State/Legislative Issues

- AOA has now achieved Aging and Disability Resource Center (ADRC) status.
- We are on track to begin the process of becoming a Veteran Direct Home and Community-based Service Provider in the next 8-12 months.
- Lisa attended the Montana Area Agencies on Aging Association (M4A) quarterly meeting October 28-29, 2015 in Helena, and Lisa and Kathi Kallis will be attending the next quarterly M4A meeting January 27-28. The January meeting will include a meeting with DPHHS Director Richard Opper to discuss funding and other Area Agency priorities as the agency begins to develop its FY 2017 budget request. M4A continues to provide input to the state interim legislative committee looking at guardianship issues for older adults and people with disabilities in Montana as well as the impact of Alzheimer's and other forms of dementia on families and the service system
- On January 26th Lisa will represent M4A at the Governor's Council on Aging meeting, also in Helena.
- Susan Kunda, Information and Assistance Program Manager and Senior Ombudsman, is participating on the newly formed state Ombudsman Committee.

Building

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

Advisory Council

- The Council did not meet in November due to Lisa's absence. The annual holiday potluck was held on December 10th and included recognition of member Doug Gilbertson's many years of service.
- We received two resignations in December.
- Open positions have been reposted.
- Officer elections will be held in January.

Outreach/Education/Media

Note: Transportation related outreach will be noted in the Eagle Transit section below.

October 2015

- 10/5/15, interview on KGEZ (Lisa's regular spot), 11,000 listenership
- 10/6/15, Presentation to Silver Sneakers on Medicare Open Enrollment and fraud prevention, 60 in attendance
- 10/8/15, RSVP newsletter
- 10/13 and 10/14/15, Estate Planning Workshops, co-hosted with Extension, 86 in attendance
- 10/22/15, booth at Bigfork Community Center Open House, 80 people attended; assisted with promotion of event in multiple forums

- 10/24/15, booth at Health Expo at Red Lion, 28 people
- 10/29/15, presentation at Kalispell Senior Center, 22 in attendance
- 10/29/15, RSVP volunteer opportunities distribution, 350
- Weekly information table at Salvation Army (10/6, 10/13, 10/20, 10/27), 147 people visited
- October AOA newsletter, circulation 400

November 2015

- 11/2/15, interview on KGEZ (Lisa's regular spot), 11,000 listenership
- 11/5/15, presentation to Kiwanis, 8 attended
- 11/6/15, articles in the Daily Inter Lake and Flathead Beacon regarding RSVP volunteer contributions to Winter Ready Program
- 11/19/15, RSVP volunteer opportunities distribution, 350
- 11/20/15, Daily Inter Lake photos of Governor Bullock's visit to the Kalispell Senior Center to highlight award to County of CDBG grant to upgrade area senior centers, circulation 17,000
- 11/22/15, Daily Inter Lake article about RSVP volunteer and former Advisory Board Chair, Mary Meister
- Weekly information table at Salvation Army (11/3, 11/10, 11/17, 11/24), 145 people visited
- 9/11/15, presentation on AOA services to Frontier Hospice, 10 in attendance
- 9/18/15, "Shred Event" hosted by RSVP, AARP and United Way at Gateway Community Center; 8 RSVP volunteers, AOA and RSVP displays and materials, 127 contacts
- 9/24/15, Medicare Open Enrollment post card outreach to 192 clients
- November newsletter, circulation 400
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Eagle Transit

- Budget:
 - We received our FY 2017 allocation from MDT: \$611,882 in 5311 funds and \$51,666 in TransADE funds, for a total of \$663,548. Although this is a large increase in TransADE funds due to the legislation that passed last session setting aside a portion of rental car fees for public transit for people with disabilities, we will receive fewer 5311 funds, resulting in an overall decrease from FY 2016 of \$4,011. The decrease in 5311 funds is based on total expenditures for FY 2015 during which time we had unfilled positions.
 - We are using the remaining New Freedom funds that must be spent by the end of this fiscal year to support the new commuter loops out of Bigfork and Lakeside, additional hours for the Whitefish and Columbia Falls city routes and outings/field trips for older adults promoted and facilitate by area senior centers.
- Montana Department of Transportation (MDT):
 - 1st quarter financial and ridership reports were submitted at the end of October.
 - The Transportation Coordination Plan process for FY 2017 has begun. Surveys were sent out in November to local rider destinations, and a public meeting was held on December 14th. Approximately 25 people participated.
 - MDT has a new web-based system for submitting the annual 5311 and capital funding applications. Commissioners need to designate an authorized submitter. That person will then have to register on the site and complete the submission process once the application is complete.
 - Staff continue to monitor proposed rule changes regarding external advertising on bus shelters that if implemented would eliminate bus shelters in our area. There is a public hearing scheduled in Helena for January 28th.
- Operations:
 - We continue to work on the new Eagle Transit bus stop signs.
 - The new commuter loops connecting all of the County's population centers are now running. The route originates in Bigfork on Mondays and Wednesday's with pick-up at Harvest Foods, and in

Lakeside/Somers on Tuesdays and Thursdays with pick-ups at the Lakeside Chapel Gathering Place and the post office in Somers. The routes include selected stops in Kalispell, Whitefish and Columbia Falls: White Oak Exxon, Lion's Park/Rosaura's, KRMC, Walmart, Shopko in Whitefish and Super 1 in Columbia Falls. Riders can catch the bus at any of these locations and make the express loop through all of the communities, or they can connect with the city buses in Kalispell, Whitefish and Columbia Falls to get to other destinations in those areas. The full route runs twice daily, and fares are \$1 per one way trip. Eagle Transit is also offering Dial-A-Ride service before and between express routes in Bigfork and Lakeside/Somers for people age 60 or older or who have a disability. Eligible riders may use the service to go to destinations in those communities or to connect to the express pick-up stop. These routes will run through the end of May at which time we will evaluate whether to continue them.

- Glacier National Park:
 - Commissioners signed Modification #7 of the Cooperative Agreement on 12/8/2015, effective through 12/14/2016. The modification establishes the budget for the year October 1, 2015-September 30, 2016 at \$750,000. The next 5-year Cooperative Agreement cycle will begin in 2016.
 - The Winter Use program in which GNP shuttles are made available to other transit entities around the state in the off-season is underway. Ten buses have been delivered to 6 transit entities, including two in the Bozeman area and others in Great Falls, Shelby, Sanders County and Butte.
- Transportation Advisory Committee (TAC): The TAC met on October 22nd. There were no meetings in November or December. The TAC will meet on January 7th and February 4th.
- Staff attended a Community Engagement Initiative Town Hall Meeting in Whitefish on October 16th, facilitated by Summit Independent Living Center, and are participating in an ongoing committee focused on improving transportation for people with disabilities in Whitefish.

Nutrition

- We received a \$975 grant from Meals on Wheels America, sponsored by Subaru (request \$5,000).
- We served approximately 500 Thanksgiving meals.
- The federal funding bill just passed includes an additional \$20 million for Older Americans Act nutrition programs – both congregate meals and Meals on Wheels.

I & R/Assistance/Ombudsman

- Medicare Open Enrollment ended December 7th. This year we also offered enhanced benefit screening as part of the Benefits enrolment Center grant. BEC data should be available for next month's report.
- We continue to work on developing a sliding fee schedule for Independent Living services using the federal poverty guidelines and are still anticipating roll-out shortly after the first of the year.

RSVP

- The newly signed federal budget contains level funding for Senior Corp programs like RSVP.
- Grant update:
 - The quarterly program progress report was submitted at the end of October.
 - The continuation grant request for the year April 1, 2015-March 31, 2016, is due January 15th.
- RSVP collected food for the Veterans Food Pantry holiday baskets. All area senior centers participated. 350 pounds of food were collected.
- Advisory Council open positions have been reposted.

Senior Mobile Home Repair

- The Advisory Board met on 12/8/15. The next meeting will be held on January 12, 2016 at 9:00 am at Flathead Electric.
- Six projects have been completed since last month's report; 26 are in progress.
- Funding:

- \$10,000 received from Oro y Plata
- \$1,000 received from Church Women United in Columbia Falls
- \$500 received from Kalispell Noon Rotary
- \$5,000 applied for from Roundup for Safety

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

- Governor Steve Bullock and Montana Department of Commerce Director Meg O’Leary visited with local officials and area seniors at the Kalispell Senior Center on November 19th to celebrate the County’s receipt of a \$437,459 CDBG grant to upgrade the Centers in Whitefish, Columbia Falls and Bigfork and to add an elevator to the Adam Building, which will house the Kalispell Senior Center business offices after their move to the new South Campus building.
- Mike, Whitney and Lisa will meet with the Senior Center Boards in Whitefish, Columbia Falls and Bigfork in January to discuss CDBG project details.
- The Bigfork Community Center Open House on October 22nd was very successful. About 80 people attended and new activities promoted at the event have been well-attended.
- The Kalispell Senior Center’s main fundraiser for the year, “It’s a Wrap,” is underway at the Kalispell Center Mall. Volunteers will wrap your presents for a donation through Christmas Eve.
- New “inter-center” card tournaments are in progress and the quarterly Center Presidents meetings will begin again in January.

Story: Helping Seniors Put Money Back in Their Pockets

Every year AOA helps older adults apply for the Montana Home Owner/Renter Tax Credit. Many people don’t know about it and are thrilled when they learn they might get a little unexpected cash back in their pockets. Sometimes, because applications can cover past years as well, it’s more than a little. Recently, friends told Isabell, who lives in Martin City, that she should give us a call to see if she qualified for the credit. A widow with no children and a very limited income, Isabelle was hoping she might get \$500 to help her with expenses. As it turns out, not only did she qualify, she was due several years of credits. This month, she received a much-needed check for \$3,982!

So far this year we’ve been able to help area seniors get back \$64,803.