



Report to the Commissioners
Area IX Agency on Aging, Flathead County
January 19, 2016
Prepared by Lisa Sheppard, Director

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 50% for FY 2016, July 1-December 31, 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:

- We continue to monitor and adjust expenditures related to Independent Living services. We are maintaining a waiting list for services which consists primarily of those whose homemaker services were temporarily suspended. The waiting list does not apply to meals, benefits counseling, or information and referral services. Some cuts are not yet reflected in the units of service provided as the billing lags 30-60 days.
- Transportation rides overall are down 6% from this time last year and are 3% off the annual target as a whole. However, rides for November and December are up from last year. November rides were up by 574 rides and December rides by 399.
- Medicare counseling units of service are almost at the annual target because of Medicare Open Enrollment which occurs mid-October through the first week of December.

AOA Administration

Budget and Contracts

- Staff have submitted budget amendment requests to Finance.
- On 1/4/2016, Commissioners signed an amendment to our DPHHS contract allowing us to bill Medicaid for certain tasks.

State/Legislative Issues

- January 25 -28, 2016: Lisa and Kathi will participate in a DPHHS meeting regarding statewide caregiver support needs and will attend both the quarterly Governor's Council on Aging meeting and the quarterly M4A meeting, which will include a discussion with DPHHS Director Richard Opper about funding needs and other issues in advance of the 2017 legislative session.

- Lisa facilitated two M4A conference calls, 12/15/15 and 1/12/16.

Building

- **New building:** Lisa and J.R. attended a construction meeting on 1/28/15. J.R. is now attending these meetings regularly. We have inventoried furniture and other items that will move to the new building and have requested J2 give us specs/bid on additional office furniture needed.
- **Kelly Road:** We've roped off the parking spaces on the left side of the building and on a portion of the right side of the building for the remainder of the winter months due ice/snow falling off the roof.

Advisory Council

- The Council met on 12/10/15 for the annual holiday potluck. Council member Jenna Justice wrote and sang a special song in honor of Doug Gilbertson whose term expired in December.
- The Council also met on 1/14/16. The Council welcomed Commissioner Holmquist as the new liaison. Officer elections were held. Lois Katz was elected to a 3-year term as Chair and Jim Driscoll to a 3-year term as Vice-Chair. Members reviewed new bylaw requirements that went into effect 1/1/16. Updates were given on the South Campus building, the CDBG grant to remodel/repair Senior Centers, what's new at Eagle Transit and the continued freeze on new Independent Living clients.
- Members voted to continue to meet monthly (even though only quarterly meetings are required). The standing day/time will continue to be the 2nd Thursday of each month from 2:00-3:30 pm.

Outreach/Education/Media

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

December 2015

- 12/7/15, monthly interview on KGEZ, 11,000 listenership
- 12/8/15, RSVP volunteer opportunities distribution, 350
- 12/14/15, Public Transit Open Meeting, 20
- Weekly information table at Salvation Army (12/1, 12/8, 12/15, 12/22, 12/29), 90 people visited
- December/January AOA newsletter, circulation 400
- December/January edition of the Montana Senior News, article about Benefits Enrollment Center services (written by AOA staff)

Eagle Transit

- Montana Department of Transportation (MDT):
 - 2nd quarter financial and ridership reports are due at the end of this month.
 - The Transportation Coordination Plan/5311 application process for FY 2017 continues. The application is due 3/1/16.
 - We received confirmation from MDT that we can make a capital request as part of our 5311 application to purchase cameras for the buses. If approved, the local match will be 13.42%.
 - A transit focus group is scheduled in Whitefish for this afternoon.
 - The Transportation Advisory Committee (TAC) will review/approve the plan on 2/4/16.
 - Following the TAC meeting, official notice will be posted in the Inter Lake.
 - **Action Needed:** The Montana Dept. of Transportation has a new web-based application for transit funding. There will no longer be a hard copy application for Commissioners to sign. The application must be authorized and submitted electronically. Commissioners may 1) authorize Lisa to submit the application on their behalf following their review/approval of the document, or 2) designate a Commissioner to submit the application. The chosen Commissioner will need to register on the MDT website and then login and submit the application once it's completed and approved. Under either scenario, Commissioners will still sign a hard copy of the resulting contract.

- Lisa will attend a public hearing in Helena on 1/28/16 to comment on proposed rule changes regarding external advertising on bus shelters that if implemented would eliminate bus shelters in our area.
- **Operations:**
 - We continue to work on the new Eagle Transit bus stop signs. There are two options, one with lettering only and another with graphics. The County Road Department can produce the simple sign but not the one with the graphic. We are in the process of getting quotes on both options.
 - The new commuter loops connecting all of the County's population centers has been running since 12/14. In the last half of December, there were 16 rides originating in Bigfork and 21 rides originating in Lakeside.
 - We finally worked out the logistical issues that were delaying our implementation of the expanded hour of service in Columbia Falls. The new route began operating last week. Expansion in Columbia Falls required that we discontinue the 3 day a week Canyon Run. We typically only had one passenger who used the service and we were able to help her make other arrangements.
 - Staff met with County IT and GIS last week to begin planning a new Eagle Transit website that will offer interactive maps, photos of buses and stops, simplified schedules and other features that will make it easier for passengers to plan rides and access important information.
 - Commissioners signed a revised contract with Chandler Communication on 1/14/16 to allow advertising wraps to be sold on the new buses.
- **Transportation Advisory Committee (TAC):** The TAC met on 1/7/2016 to discuss current and future funding needs and potential solutions. The TAC will meet next on 2/14/16 to review and approve the FY 2017 Transportation Coordination Plan/5311 application and capital request.

Nutrition

- We submitted the final report related to the receipt of the \$975 grant from Meals on Wheels America, sponsored by Subaru.
- We distributed food safety fliers to all the congregate sites and in home-delivered meals.
- J.R. volunteered as Santa at the Christmas at Our House celebration at the Armed Forces Reserve Center, and his grandson Cody was featured in the Inter Lake for collecting and giving away hotwheels to children in attendance.
- The Nutrition Committee met on 1/12/16.

I & R/Assistance/Ombudsman

- The sliding fee schedule for Independent Living services is almost complete.
- Our Outreach Coordinator is organizing BEC benefits screening events at Senior Centers, Gateway Community Center (in partnership with Summit Independent Living Center), senior housing complexes, etc. between now and the end of April.
- In 2015, we assisted older adults to get back \$68,048 in property tax refunds.
- Data reports: of active clients assessed
 - 71% are at moderate to high risk based on physical health needs
 - 45% need assistance with transportation
 - 14% are experiencing cognitive decline
 - 22% report mental health needs
 - 13% have limited social connections
 - 73% need help with household and/or personal tasks
 - 64% live alone
 - 36% have at least one life factor rated at the highest risk category

RSVP

- Grant update:
 - The continuation grant request for the year April 1, 2015-March 31, 2016, was submitted 1/15/16. CNCS funding will remain at the base level of \$50,246.
 - Reimbursement for the quarter ending 12/31/15 has been requested.
- The Advisory Council meets bi-monthly but postponed the January meeting to 2/24/16 to allow members to be appointed in January to attend.

Senior Mobile Home Repair

- The Advisory Board met on 1/12/16. The next meeting will be held on 2/9/16 at 9:00 am at Flathead Electric.
- Four projects have been completed since last month's report; 24 are in progress.
- Funding:
 - \$1,000 received from Airworks
 - \$5,000 requested from Northwest Energy

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

- Mike, Whitney and Lisa are in the process of meeting with the Senior Center Boards in Whitefish, Columbia Falls and Bigfork to discuss CDBG project details. They met with the North Valley Senior Center Board on 1/12/16 and are scheduled to meet with the boards in Whitefish and Bigfork this Thursday.
- The Bigfork Community Center is experiencing a severe plumbing issue and as a result is closed temporarily. Dave Prunty, County Road and Bridge Director, is coordinating repairs as well as arranging for the removal of two damaged trees. AOA is handling home-delivered meals for the area from Kelly Road and we are working with the Center Board to explore short-term alternatives for congregate meal service.
- The Kalispell Senior Center's main fundraiser for the year, "It's a Wrap," raised \$4,400.

Story: The Benefit of Benefits Screening

It really pays for older adults to come in for an annual review of their Medicare plans and to let us look for other benefits that might help them make ends meet. Recently, a woman came in to AOA for a Medicare plan review. She had spent many years in the mission field and was in Africa during her 60s. When she got back to the United States and finally signed up for Medicare, she incurred a penalty for late enrollment in Part B. Being of gentle spirit, she never complained. Each month the \$105 premium plus the \$59 penalty is deducted from her social security check. When she came in for her appointment, she brought in a well-documented accounting of her finances. Staff conducted an enhanced screening and found she is eligible for additional benefits that almost fully cover the cost of her monthly premium *and* the penalty. She now gets to keep \$160 in her pocket to use on other critical personal and household expenses. A true success story!