



Report to the Commissioners
Area IX Agency on Aging, Flathead County
March 18, 2013
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Story: RSVP volunteer's dedication makes a huge impact on area seniors

Every month I ask staff for a story that illustrates what we do and why we do it. This month, 83 year-old RSVP volunteer Ruth Pomeroy shared with me her story of helping a 74 year-old woman straighten out incorrectly charged insurance and tax payments that were eating up half of her \$1,482 monthly income. It took a lot of persistent investigating and advocating on Ruth's part to correct the problem, but in the end she prevailed. The woman's insurance premium was drastically reduced and she received a refund of \$3,830. Additionally, Ruth helped her apply for the Montana 2EC tax credit and took her to get help through the free AARP tax program to ensure she received the tax refunds she was due.

The real story, however, is Ruth herself, although her humility would never allow her to acknowledge that. I know; I've tried. She is, simply put, a *fixture* at AOA and in this community – familiar, strong, permanent, ever-present, enduring and so very necessary to our work. I am hard-pressed to think of something that Ruth *doesn't* do, whether for us or others. Over the past two years, she has put in more than 1500 hours volunteering at Immanuel Lutheran Home as a companion and as a member of the Care Team Ministry which supports seniors to stay in their homes. She also spends 50-100 hours a month at AOA counseling seniors on their Medicare options, educating and empowering them to protect themselves from fraud and abuse, and problem-solving for those in need. And if that isn't enough, she plays the piano for local assisted living facilities and at lunch at Kelly Road. Not that a dollar figure can truly measure the value of what Ruth does, it is striking to note that even at the conservative Montana rate of \$15.28 per hour, Ruth has contributed more than \$50,000 in service to seniors in the Flathead over the last two years. Thank you Ruth – you inspire us all!

AOA Administration

Budget

- Staff proposed amendments to the FY 2013 budget based on a cross-walk with the DPHHS contract and an analysis of receipts and expenditures to date. Further revisions may be necessary to address a possible 4.79% cut in federal FY 2013 funds. AOA's current state contract includes both federal FY 2012 funds (which will not be cut) and FY 2013 funds. We are waiting for direction from DPHHS.
- Staff are in the process of developing the proposed budget for FY 2014 which includes a potential 8.2% cut in federal FY 2014 funding as a result of the sequester. DPHHS has advised that state funding levels will remain the same or possibly increase.
- It appears that AOA has sufficient funds to absorb the potential cuts in both FY 2013 and FY 2014 without reducing services at this time. The negative impact will be further mitigated if state funding is increased.
 - It may be necessary to revisit the proposed FY 2014 CIP with regard to vehicle purchasing timelines to ensure client services remain intact.

Legislative Issues

- AOA staff are monitoring the status of the automatic cuts in federal discretionary spending known as sequestration which took effect on 3/1/13. The ultimate result is unclear at this time.
- The Montana state legislature appears to be moving forward in its consideration of adding aging services to the base budget (as opposed to the One-Time-Only status it has had for many years) and providing additional funding over the biennium.

Building

- CDBG
 - On 2/19/13, Commissioners approved going forward with the Preliminary Architectural Review (PAR) and agreed to state their commitment for matching funds necessary to proceed with the CDBG application as requested by the City of Kalispell as part of their consideration of the County's request for the City to host the project.
 - On 2/21/13 the Commissioners reconsidered the discussion from 2/19/13 and reaffirmed their commitment to moving forward with the grant application.
 - On 2/25/13 County Grant Specialist Debbie Pierson, County Administrator Mike Pence and AOA Director Lisa Sheppard presented information on the proposed project to the Kalispell City Council. The Council agreed to consider at its next meeting a resolution to host a public hearing sometime in early April to allow time to complete the PAR.
 - On 2/28/13 Commissioner Krueger, Mike Pence, Debbie Pierson, Lisa Sheppard and IT staff met with Ken Huff of Architects Design Group to discuss the PAR process and site assessment criteria. The sites to be assessed include county-owned property north of the Fairgrounds and south of the Earl Bennett Building.
 - On 3/4/13 Ken Huff met with Lisa Sheppard, toured the Kelly Rd. bldg. and met with staff to review functional/space needs.
 - On 3/4/13 the Kalispell City Council passed a resolution to hold a public hearing on the proposed CDBG application on 4/1/13.
 - On 3/12/13 CDBG staff confirmed AOA can use existing LMI information for the application, no additional survey needed.
- Public Input
 - As part of the overall AOA strategic planning process, focus groups and individual interviews are being held with various stakeholders, including Senior Center Boards and general membership, AOA Advisory Boards, other service professionals, volunteers, those who receive AOA services and interested members of the community-at-large. The proposed building is one of the topics covered. All sessions are being recorded for transcription.
 - Eight focus groups have been held to date with six more scheduled between now and 4/4/13.
 - **On 3/21/13 at 1:00 pm AOA is hosting an Open Forum at Kelly Road to get public input on the proposed building.**
- Kelly Road
 - The Risk Management Team, Maintenance Director Jed Fisher and representatives from PayneWest Insurance met at AOA on 2/22/13 to review options to help address some of the safety concerns.
 - Commissioners have approved the following::
 - Creating additional office space in the front of the building to eliminate the use of the offices in the food storage area for serving individuals seeking I&R assistance; the offices that will no longer be used for staff will be repurposed to store commodities as

- they have portable air-conditioners that will prevent potential damage and spoilage from excessive heat.
 - Sealing the area that causes frequent flooding in offices in the food storage area.
 - Re-sealing the concrete floors in the kitchen and dining areas.
 - Bids to eliminate the use of electrical cords across walkways to power the serving line have been received and are in the process of being reviewed.

Advisory Council

- The AOA Advisory Council and Finance Committee meetings were held on 3/14/13.
- The Finance Committee reviewed proposed amendments to the FY 2013 budget as well as revenues and expenditures to date against the original and proposed amended budget.
- The primary purpose of the AOA Council meeting was to engage in focus groups as part of strategic planning and building development. Two groups were facilitated.
- Other topics discussed included an update on the potential impact of sequestration on the AOA budget and programs, state legislative updates, the upcoming Governor's Conference on Aging in April, and the status of the CDBG application.
- The Wellness Committee met on 2/28/13 to engage in a brainstorming and strategic planning session around wellness-related initiatives for the senior community.
- The By-law Review Committee will meet this afternoon to discuss possible revisions to increase clarity, eliminate contradictory language, ensure the inclusion of Older Americans Act requirements and consider options for streamlining and enhancing Council and Committee functions.

Strategic Planning

- As noted above, focus groups, interviews, etc. are underway with various stakeholders throughout the County.

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

- The Daily Interlake reported on Commissioner's CDBG discussion. (2/21/13)
- The Daily Interlake reported on City of Kalispell consideration of CDBG application. (2/24/13)
- The Daily Interlake reported on functional and safety needs at AOA building as well as the value of RSVP volunteers. (2/24/13)
- The Flathead Beacon ran a story on the need for a new AOA building. (2/27/13)
- The Daily Interlake published an editorial in support of a new building for AOA. (3/2/13)
- Lisa Sheppard gave a brief presentation of AOA services at the BNI meeting on 3/13/13.
- Upcoming: Lisa is scheduled to speak at the Kalispell Kiwanis meeting on 4/4/13 and at the Noon Rotary on 5/2/13.

Eagle Transit

- February 2013 ridership was 8,076 compared with 8,072 in February 2012. FY13 ridership to date is 62,719 up 2.3% from last year's total of 61,323. Annual target is 78,750 or approximately 6,562 rides per month. The average for this fiscal year through February 2013 is 7,840 rides per month. We are on track to total more than 90,000 rides this fiscal year.
- The Eagle Transit Advisory Board met on 3/7/13. The focus of the meeting was review of the by-laws, discussion of transition to a Transportation Advisory Committee (TAC) and review of proposals received for the new 5 Year Transportation Coordination Plan.

- The RouteMatch City Module was installed and is up and running.
- We are working to resolve some billing issues with Glacier National Park.

Nutrition

- Total meals served in February were 5,898. Congregate meals totaled 2,940 and home delivered meals totaled 2,961. There were 19 new home-delivered customers for a yearly total of 275 and 57 new congregate customers for a yearly total of 863. Total meals served this fiscal year as of 2/28/13 were 49,991. Average meals served per month to date is 6,249, which is slightly under the FY 2012 average of 6,370 meals per month. Our target for FY 2013 is 77,250 (monthly average 6,437).
- Discussions are underway with Senior Centers in Columbia Falls, Lakeside and Big Fork on how AOA can support outreach efforts to increase the number of congregate customers and MOW recipients.
- Lisa has compared Flathead County's cost per meal to three other Area Agencies on Aging in Montana (one county-run and two that outsource) and our costs are below all three. The two agencies that outsource show the highest cost per meal.
- Nutrition Manager J.R. Isles and Lisa met with representatives from Kalispell Regional Medical Center on 3/4/13 to discuss outsourcing options through the hospital. We expect an informal estimate shortly.

I & R

- February Independent Living statistics include:
 - 244 hours of homemaker services (2,333 through 2/28/13, an average of 292 per month); our annual target is 3,675 or an average of 306 hours per month
 - Total number of homemaker clients through 2/28/13: 144
 - 108 hours of escort/errand services (1,242 through 2/28/13, an average of 155 per month); there is no workload indicator for this service in the FY 2013 budget
 - Total number of escort/errand clients through 2/28/13: 55
 - 233 hours of respite (1,890 through 1/31/13, an average of 236 per month); our annual target is 3,500, which averages 292 hours per month.
- February statistics regarding legal clients, I&R calls/walk-ins/home visits, telephone reassurance, SHIP contacts, and Ombudsman visits are not yet available.
- In January we instituted a waiting list for homemaker and escort/errand services. We are now removing people from the waiting list onto services.
- Staff is working on a new risk assessment protocol to better identify, serve and track clients at risk for institutionalization.
- IT is working with AOA to retire the outdated data collection system and ancient server. Thanks IT!

RSVP

- In 2012 RSVP had 80 community partners and 485 active volunteers who served 34,846 hours in Flathead County, which equates to \$532,447 in added value to the community.
- RSVP Director Sue Holst and Volunteer Coordinator attended the ServeMT Symposium and Senior Corp meetings in Helena this month.
- We received the CNCS Notice of Grant Award for the first quarter of the 2013-2014 grant year (April, May, and June 2013).
- The United Way application is almost complete and will be submitted no later than 3/22/13 and will be presented in May.

- The newsletter went out this month highlighting volunteer achievements and opportunities.
- The All Schools Cribbage Tournament on 3/27/13 from 9:00 am-2:00 pm at the Gateway West Mall. **Commissioners are invited to attend!**
- The RSVP Advisory Board met on 2/20/13. The standing meeting time for the Board will change to the 4th Wednesday of the month so that Commissioner Krueger can attend. The March meeting, however, will occur on 3/28/13 to allow members to participate in the Cribbage Tournament.

Senior Mobile Home Repair

- The Advisory meeting was held 3/12/13.
- Five projects have been completed, three are in progress and two previously completed projects have been approved for additional work.
- New donations were received totaling \$500.
- Grant awards/requests:
 - Roundup for Safety awarded the program a grant for \$5000.
 - Plum Creek will consider a request for \$3000 in June.
 - Application has been submitted to Applied Materials for \$10,000.

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

- Focus groups have been held with all Center Boards and are scheduled for general membership at each Center.
- Lisa met with Bigfork Senior Center members on 3/15/13.
- AOA is hosting a meeting on 4/5/13 for all Senior Centers with David Mirisch, fundraising consultant from Missoula.
- The Senior Centers housed in county-owned buildings (all but one) are struggling to cover much-needed repair costs which significantly reduce the funds they have available to maintain or enhance their programming and activities. Additionally they have difficulty getting grants or other support targeted to repairs or building upgrades because funders do not want to donate money that will be spent on a leased space. We are looking at the AOA budget to determine whether we can increase the funds to the Senior Centers (and for how much and what purposes) and would welcome a conversation with Commissioners regarding the possibility of the County assisting with maintenance of its buildings.