



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**July 21, 2014**  
 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, June 2014 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.

The general target is 100%, keeping in mind that some numbers will be unevenly distributed throughout the year and some numbers will change during the end of the fiscal year reconciliation process.

<b>MEASURE</b>	<b>FY 2013 Actuals</b>	<b>FY 2014 Target</b>	<b>June 2014</b>	<b>Total Last Report</b>	<b>Total/Avg. to Date</b>	<b>% Target</b>
# Receiving Independent Living Services	317	350	not yet available	305	305	87%
# Receiving Meals on Wheels	349	373	25	426	451	121%
# of Seniors Receiving Congregate Meals	817	832	25	833	858	103%
# of Eagle Transit Dial-A-Ride Customers	368	470	107	680	787	167%
# of RSVP Volunteer Hours	40,468	32,000	not yet available	40,527	40,527	127%
# of Public Outreach/Education/Media Efforts	35	48	14	79	93	194%
% of Ind. Liv. Recipients/Intake at Moderate to High Risk of Institutionalization	N/A	70%	88%	84%	88%	126%
Per Meal Cost of Nutrition Services	\$6.08	\$6.00	\$6.14	\$5.65	\$5.77	102%
% of Annual Survey Respondents Who Indicate Overall Satisfaction with AOA Services	N/A	90%	N/A	N/A	N/A	N/A
Maximum # of Public Complaints About Transportation Services ( 5 per month, no more than 60 annually)	N/A	60	2	15	17	28%

WORKLOAD INDICATOR	FY 2013 Actuals	FY 2014 Target	June 2014	Total Last Report	Total/Avg. to Date	% Target
<b>Nutrition</b>						
Meals Served	76,893	78,000	6,704	72,233	78,937	101%
# Nutritional Assessments Conducted	not available	560	104	435	539	96%
<b>Transportation - March only</b>						
Total Ride Count	93,833	96,000	7,021	87,514	94,535	98%
Dial-A-Ride Count	34,083	40,320	2,186	23,476	25,662	64%
City, Commuter and Other Ride Count	59,750	55,680	4,835	64,038	68,873	124%
<b>Information and Referral - March only</b>						
Outreach, Info and Referral Contacts	15,896	16,300	not yet available	15,030	15,030	92%
<b>Independent Living</b>						
Homemaker Units of Service	3,318	3,780	not yet available	2,810	2,810	74%
Escorted Transportation Units of Service	1,845	1,768	not yet available	2,046	2,046	116%
Respite Units of Service	2,742	2,932	not yet available	2,086	2,086	71%
Community Support Units of Service	N/A	N/A	not yet available	395	395	N/A
Medicare/Insur. Counseling Units of Service	1,793	1,300	not yet available	1652	1,652	127%
<b>RSVP</b>						
Volunteers Recruited/Enrolled	493	500	not yet available	495	495	99%
Volunteer Work Stations Developed and Maintained	59	60	not yet available	87	87	145%
RSVP Newsletters/Volunteer Opportunities Produced and Distributed	4	6	not yet available	8	8	133%

## AOA Administration

### *Budget*

- FY 2014: Admin staff is working to reconcile the FY 2014 DPHHS revised budget with final expenditures and will make adjustments in CSA accordingly
- FY 2015: the FY 2015 DPHHS contract budget is ready for Commissioner review and approval.
- Capital purchases: We are ready to purchase a new vehicle and a new copier. Sufficient funds for both purchases are in the Agency's CIP account (\$38,000). Commissioner approval is needed to move forward with the purchases, so we are requesting a motion on those items today.

### ***State/Legislative Issues***

- M4A: Lisa and Kathi Kallis attended the M4A quarterly meeting in Billings June 18-19, which included a training and strategic planning session facilitated by the National Association of Area Agencies on Aging (n4a). On the way back, we toured the Bozeman Senior Center.
- Lisa had the opportunity to meet with Senator Tester and his staff on 6/27/14 to discuss funding and other challenges facing the aging network..
- Development of Area Plan for October 2015-September 2019: We continue to work with volunteer consultant, Sam Herbert, to help us develop and implement a survey and interviews. The survey is ready and will go out this week with a requested return date of August 1, 2014. Mr. Herbert will follow up with in-person interviews with at least 10% of respondents to be completed by the end of August.

### ***Building***

- **New building:** County Commissioners approved the new South Campus building in the CIP and the FY 2015 budget. The building will house AOA and other county offices.
- **Kelly Road:** Thank you to Flathead Industries for donating the beautiful flowers/planters at each entrance.

### ***Advisory Council***

- AOA Advisory Council and Finance Committee met on 7/10/2014. Board Chair Lois Katz thanked members for their volunteer efforts at the Older American Day Picnic. Members decided on a new committee structure and determined specific committees. There will be no August meeting due to the Fair. The next meeting will be held on September 11th.

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

- On 6/2/14, Lisa was interviewed on KGEZ (regular monthly spot).
- On 6/3/14, the Daily Inter Lake featured an article on RSVP volunteer Mildred Nielson, titled “Woman Crochets for Many Causes.”
- On 6/6/14, the Flathead Beacon ran an article on GNP’s scoping meetings, titled “Comments Focus on Shuttle System, Corridor Management.” Superintendent Jeff Mow was quoted as saying, “Commenters frequently indicated they enjoyed taking the shuttle and hoped the park would continue the service while finding a way to make it financially sustainable in the long term.”
- On 6/10/14, the Daily Inter Lake ran a half page ad from AOA thanking all of the supporters of the Governor’s Conference on Aging held here in May.
- On 6/12/14, the Daily Inter Lake featured an article on the new building titled “Agency on Aging site picked near county courthouse” with a follow-up editorial supporting the decision.
- AOA Information and Assistance staff had a booth at Project Homeless Connect, July 12-13, providing information to about 48 people. Eagle Transit provided free city bus and paratransit rides to the nearest stop.
- The June/July edition of the Senior Montana News featured three articles related to AOA:
  - A multi-page spread on the Governor’s Conference
  - An article on AOA services titled “Walking the Walk”
  - An article on Eagle Transit titled “A Tale of Two Riders”
- Promotion of the Older Americans Picnic included:
  - 6/6/14: North Valley Senior Center monthly potluck
  - 6/9/14: Whitefish Community Center
  - Poster design and distribution in Kalispell, Whitefish, Columbia Falls, Lakeside/Somers and Bigfork
  - Press releases to local media
- Also in June, J.R. Isles, Nutrition Manager, talked about Meals on Wheels to children attending vacation bible school at the Methodist Church in Whitefish

## Eagle Transit

- The RouteMatch onsite consultation has been scheduled for the week of August 11<sup>th</sup>. We have agreed in writing upon the items to be addressed and resolved during the visit. MDT staff will participate in the visit as well.
- The Eagle Transit Advisory Committee (TAC) met on 7/10/14 at its new location at Heritage Place. Topics of discussion included the status of Highway/Mass Transit Trust Fund legislation and the potential impact on Eagle Transit if Congress fails to act on it in a timely manner, the approved FY 2015 budget and progress on RouteMatch issues.
- Eagle Transit provided bus service from Whitefish and Columbia Falls to the Older Americans Picnic at the Fairgrounds on 6/27/14 for a total of 74 rides. Eagle Transit staff also volunteered at the picnic.
- The Glacier Park shuttle service opened a week early to provide express service to the loop. Full shuttle service began on 7/3/14. As in past years it continues to be a challenge to fully staff drivers on the east side of the Park. Staff are working in partnership with the Park to develop a solution.
- The TAC, along with the Commissioners, will visit the Park on 8/7/14 to experience the shuttle service firsthand and meet with Superintendent Jeff Mow.

## Nutrition

- Educational materials and the “Senior Scoop” are sent out monthly to all Meals on Wheels and nutrition sites (approximately 300 recipients).
- The Older American’s Day picnic was held on June 27<sup>th</sup> at the Trade Center at the Fairgrounds. We served approximately 430 seniors. **Thank you to the Commissioners for greeting our guests, to all of the volunteers who made it happen, and to Mark Campbell and his staff for making the trade center available to us and helping us set up. And a special thank you to Jim Driscoll and New West Insurance for the \$500 sponsorship. All are greatly appreciated!** Highlights included a brief speech by Senator Tester; presentation of Certificate of Appreciation to local seniors, including George Ostrom and seniors chosen by each of the 5 area centers: Russ Penne from Kalispell, Ralph Ammondson from Whitefish, John Beranek from Columbia Falls, Maggie Pontius from Bigfork and Hellen Ebert from Lakeside; and a quilt raffle hosted by the senior centers to benefit Meals on Wheels.
- Nutrition staff are noting an increased number of new and younger individuals coming to the Kelly Road site for lunch.
- Long-time AOA cook John Taft has retired. John has been a county employee for more than 30 years, and his liver and onions are legendary. He will be sorely missed!

## I & R/Assistance

- We have transitioned all but about 20 of 141 Independent Living clients to the new providers.
- As part of the opportunity presented with the IL transition, we have improved our quality controls measures and increased the rates to providers to mirror the comparable Medicaid rates in order to cover the cost to the providers of providing the enhanced services.
- We have decided to continue with primary SMP funding for fraud and abuse prevention education as we confirmed we will not be held to the new requirements related to supplemental SMP funding.
- Flathead Industries is busy installing A/C units for seniors who need them as part of our expanded loan program. AOA staff are also screening those who request an A/C for other AOA services, which has not been done in the past.
- Staff and RSVP volunteers are partnering with AARP to support a free document shredding event in September. Staff participated in a planning meeting on 6/20/14.
- Promotion and sign/up efforts continue for the legal clinic to be held at the Whitefish Community Center on 7/30/14.
- We continue to work with IT to complete and refine the needed database reports. We are getting very close. Thank you to Tim Postier in IT for his perseverance and extraordinary patience.

## **RSVP**

- President Obama's proposed FY 2015 budget included significant cuts and programmatic changes to RSVP program that would have made it unrecognizable as the program it is today. The U. S. Senate rejected the proposal and has recommended funding at current levels.
- RSVP volunteers provided the desserts and drinks for the Older American's Day Picnic.
- CNCS offered us an opportunity to request an additional \$2500 to support volunteer training efforts. We completed the required budget revision and submitted it for approval on 7/18/14.
- The RSVP Advisory Board met on 6/18/14 and 7/16/14. At the June meeting, Commissioner Krueger updated members on various issues around the county, including the new south campus building. The board is also working to develop new members.
- RSVP staff and volunteers are involved in the HEART Locker program to help promote awareness of student homelessness in the Valley and to help with the backpack program that provides food to students for the weekend.
- The shredding event in collaboration with AARP will serve as RSVP's September 11<sup>th</sup> National Day of Service.
- The annual volunteer recognition banquet has been set for September 9<sup>th</sup>.

## **Senior Mobile Home Repair**

- Advisory Board meeting was held on 7/8/14.
- 2 projects were completed and 15 are in progress.
- Funding: The Board is pursuing grants from the Lakeside Community Foundation and the Lambros Foundation.

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

- Whitefish: The Whitefish Summer Solstice Bluegrass Bash fundraiser on 7/21/14 was a huge success, raising more than \$5000. In June, the Center arranged a tour of FH Stoltze Land and Lumber. The Center is now partnering with Whitefish Parks and Rec to introduce Pickleball to the area.
- Kalispell: Tom Murphy of Flathead Industries promoted the A/C loan program to members on 7/14/14.
- Columbia Falls: Tom Murphy also attended the North Valley monthly potluck on 7/11/14 to promote the A/C loan program.
- Bigfork and Lakeside: Christine Neater, AOA outreach Coordinator, visited both centers.

## **Story: Secret Rider**

We've all heard of "secret shoppers", but at Eagle Transit we have our own "secret rider." TAC member Jim Pearson recently visited the Park with guests. They rode the free shuttle, which is operated by Eagle Transit through a cooperative agreement with the National Park Service. Upon returning, he emailed the following comment:

"Some friends from Colorado and I visited GNP on the first day that the busses were running to Logan Pass. We loaded onto a Sprinter that was being driven by a new bus driver. He was learning what to say to passengers and when to say it. He was also being cautioned at different points regarding traffic congestion and what to watch out for. The individual overseeing his training was Joe Miller. We rode both up to Logan Pass and down again with this driver and Joe. I just want to congratulate Joe Miller on his professionalism and demeanor. I was impressed with the whole operation. I believe that the way Joe handled his training assignment is a reflection on the bus operation as a whole inside the park. Upon departing the Sprinter at Avalanche, I told Joe that I was on the committee and congratulated him on a job well done."