Report to the Commissioners
Area IX Agency on Aging, Flathead County
July 16, 2018
Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2016 actuals
FY 2017 annual targets
FY 2017 actuals
FY 2017 actuals as a percentage of annual targets
FY 2017 actuals as a percentage of FY 2016 actuals
FY 2018 actuals to date
FY 2018 annual targets
FY 2018 actuals as a percentage of FY 2018 annual targets

The general target is 100% for FY 2018, July 1, 2017-June 30, 2018, 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 some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as "new" in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. 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:

- **Outreach/Education/Media**
  - We were just shy of our target related to aging services at 97% but far exceeded our target for Eagle Transit at 280% due to our efforts to increase ridership and educate the public about route/service changes that took effect on July 1st.
- **Meals/Nutrition**
  - Total meals served exceeded the target for the fiscal year but lagged 1,789 meals from last fiscal year. Congregate meals were up 497 from last year while home-delivered meals were down 2,286.
  - The number of seniors participating in congregate meals substantially exceeded the target, but was below the number served last year.
  - The number of home-delivered meal clients is 80% of this year's target and 80% of the number of clients served last year. The decline does not appear to be due to a data collection or reporting error.
- **Transportation**
  - Total rides are 10% above target for the year at 99,104. This beats the previous record of 94,535 rides set in FY 2014.

- Excluding the GNP commuter, there were 2,357 more rides this fiscal year than last.
- Fixed route rides in Kalispell lagged only 4% from last year (down from a high of 24% in December 2017).
- Although total number of unduplicated Dial-A-Ride riders is below target at only 66%, total Dial-A-Ride rides are 5% above target and 5% higher than the number of rides provided last year.

- **Information/Referral and Assistance**
  - We ended the fiscal year with 19,429 contacts, which is 8% above target and 10% above the number of contacts last fiscal year. We believe the high rate is due to an increase in demand for our services as well as state funding cuts to other providers, leaving clients with fewer avenues for assistance.
- **Independent Living Services**
  - We continue to be below target for the number of people served and the number of units of service provided for the year as we managed the 2.5% cut in state funding for FY 2018 by freezing IL services.
  - The client and unit of service numbers reported are through May. June numbers will be reported next month.
- **Benefits Counseling**
  - We exceeded our target for the year.
- **Ombudsman**
  - We exceeded our target for the year.

<u>AOA Administration</u>

Budget and Contracts
- We are still waiting for firm budget allocations for FY 2019 (state and federal funding).
- We just received the final amended contract for FY 2018 from DPHHS. Tara is reviewing it.

Building
- Punch list update:
  - We're monitoring the temperature in the dry storage area now that we are experiencing summer temperatures.

HR/Staff Development
- We have three open positions we are in the process of filling: Assistant Director (1.0 FTE), Cook (.875 FTE) and Transportation Manager (1.0 FTE).

<u>State/Federal/Legislative Issues</u>
- At this time, both the Senate and House versions of the FY 2019 federal budget maintain the increases for aging services achieved in FY 2018, including nutrition, IIB supportive services, caregiver support, preventive health and SHIP.
- M4A
  - Lisa participated in the monthly stakeholders meeting on 7/11/18 with Governor Bullock's staff via conference call.
  - Lisa will attend the Governor's Council on Aging meeting in Helena July 24th.

AOA Advisory Council

- The Advisory Council met on July 12th.
- Staff from the Abbie Shelter presented on domestic violence and challenges for older women.

Outreach/Education/Media

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

- 6/4/18, monthly KGEZ interview, 15,000
- 6/7/18, participation as event partner in Reason to Hope Alzheimer's breakfast, 50
- 6/7/18, hosted the Flathead Senior Connection, 20
- 6/9/18, participation in Veteran's Stand Down, 300+
- 6/26/18, Medicare 101 class, 10
- 6/1-6/15, promotion of Older American's picnic in community calendars, 17,000
- 6/14/18, KOFI interview about picnic on Wendy Ostrum-Price show, 15,000
- 6/15/18, hosted 40th annual Older American's picnic, info booths from AOA, local senior centers and service providers

Age-Friendly Flathead

- The Steering Committee did not meet in June. The next meeting is scheduled for 7/26/18.
- Lisa met with staff from the cities of Columbia Falls and Kalispell.

Eagle Transit

- Montana Department of Transportation (MDT):
  - 5-Year Transportation Development Planning Grant
    - The following new routes/services began on July 1st. After working out a few rough patches the first week, they are all running smoothly.
      - Kalispell city bus (new north/south "figure 8" loop with transfer stop at Gateway Community Center)
      - Evergreen Commuter (replaces fixed route service)
      - Tri-City Commuter (connects cities of Kalispell, Columbia Falls and Whitefish for the first time)
      - Increased paratransit capacity in the Kalispell area and premium Dial-A-Ride service in Evergreen (replaces paratransit service associated with former fixed route)
    - Lisa made public comment to the Kalispell City Council on 7/2/18 regarding the July 1st changes.
    - New bus schedules are posted online and print versions are available on the buses, at AOA and in various locations in Kalispell, Evergreen, Columbia Falls and Whitefish,
    - Staff continue to work with the City of Kalispell regarding permitting and installation of bus stop signs. We're hoping for September 1st approval.
    - Now that the short-term changes have been made, committee members will follow-up with city council members/staff from Kalispell, Whitefish and Columbia Falls to discuss other issues related to the 5-year plan.
    - We've requested and been granted an extension to the planning grant contract through December 31, 2018 to allow us to complete the project and submit the final report. The extension is on the Commissioners' agenda for signature this morning.
  - This week MDT is auditing our financial reports for the first three quarters of FY 2018.

- Outreach/Education/Media/Special Events:
  - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
  - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in June.
  - The June TAC meeting was listed in the Daily Inter Lake daybook, 6/3-6/7.
  - Public information meetings regarding the July 1st changes were held at Gateway Community Center on 6/12/18 and 6/20/18.
  - The Daily Inter Lake ran two transit related articles in June:
    - 6/4/18, "Sun Road shuttle gives hikers and bikers a lift"
    - 6/11/18, "Eagle Transit seeks public input on new bus routes"
- Operations:
  - Dale Novak is retiring at the end of September. The Transportation Manager position has been posted.
- Transportation Advisory Committee (TAC)
  - The TAC will meet next on August 2, 2018 and will also take its annual trip to Glacier National Park on August 16, 2018.
- Glacier National Park
  - The regular summer shuttle season began on July 1st. Total rides are 10.6% above this time last year at 46,237.
  - The GNP summer commuter rides from Kalispell, Whitefish and Columbia Falls to the Park totaled 252 as of Friday. Last summer, there were 360 rides from outside communities into the park, so we expect to easily exceed that by the end of the season.

Nutrition

- We were able to cover most of the cost of the Older Americans Picnic this year thanks to the following sponsors:
  - Gold: Bailey Insurance Services, Glacier Bank, Kalispell Regional Healthcare and Welcov Healthcare (Lake View Care Center and Heritage Place)
  - Silver: Frontier Hospice, Montana Coffee Traders, United Way, A Plus Health Care, Flathead Electric Cooperative, Humana, Loyal Care, Addus Homecare, Smith's
  - Bronze: Berube Physical Therapy, Express Employment Professionals, Hearing Aid Institute of Kalispell
- J.R. attended a regional Nutrition Manager's meeting in Polson on 6/21 to discuss nutrition needs and program challenges with state staff.

I & R/Assistance/Ombudsman/Independent Living Services

- We have received 26 referrals to date for the VA for the Veteran-Directed Home and Community-Based Services Program
- Independent Living Services:
  - We implemented the sliding fee scale on July 1st.
  - Staff have begun home visits with all clients to reassess their needs and conduct Benefits Check-Ups to screen them for other programs they might be eligible for and to determine their cost share rate on the sliding fee scale.
  - We are in the process or revising our provider contracts to reflect our new processes.

RSVP

- Grant update: We have not yet received official word from CNCS about the grant close-out. Lisa has submitted another inquiry.

Senior Mobile Home Repair

- The Advisory Board met on 7/11/18. The next meeting will be August 8, 2018 at 10:00 am at Flathead Electric.
- Three projects were completed this past month; 25 are in progress; 8 need assessment; and 31 are on the waiting list.

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

- On July 25th the Whitefish Community Center is hosting the state to conduct a Legal Documents Clinic for limited income seniors who need help with estate-planning documents like wills, powers of attorney and advanced directives. AOA staff have assisted in promoting the clinic.

July 2018 Report: Performance Measures Tables - June 2018 stats (FY 2018)

100.00%

MEASURE	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 2017 as % FY 2016		June	Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
# Receiving Independent Living Services	447	400	178	45%	40%		**0**	110	110	233	47%
# Receiving Meals on Wheels	471	450	470	104%	100%		**12**	362	374	465	80%
# Seniors Receiving Congregate Meals	867	980	1,785	182%	206%		**66**	1,338	1,404	1,000	140%
# Eagle Transit DAR Unduplicated Riders	502	500	401	80%	80%		**1**	330	331	500	66%
% of Service Recipients at Moderate to High Risk of Institutionalization	94%	88%	89%	101%	95%		**92%**	90%	92%	88%	105%
Per Meal Cost of Nutrition Services	$6.30	$6.50	$6.89	106%	109%		**$6.29**	$6.15	$6.29	$6.75	93%
% Overall Satisfaction with AOA Services from Annual Survey	N = 98%, IL = 95%	95%	N=99% IL-96%	100%	100%		**N/A**	N=97% IL=90%	N=97% IL=90%	95%	N=102% IL=95%
Maximum annual number of transportation complaints	27	36	30	83%	111%		**2**	10	12	36	33%
WORKLOAD INDICATOR	**FY 2016 Actuals**	**FY 2017 Target**	**FY 2017 Actuals**	**FY 2017 % of Target**	**FY 17 as % FY 16**			**Total Last Report**	**Total/Avg. to Date**	**FY 2018 Target**	**% Target**
Outreach/Education/Media							**June**				
Public Outreach/Education/Media Efforts	153	120	123	103%	80%		**8**	108	116	120	97%
Nutrition							**June**				
Total Meals	78,541	82,000	82,428	101%	105%		**6,067**	74,572	80,639	79,000	102%
MOW	49,283		49,695	N/A	N/A		**3,574**	43,835	47,409		
Congregate	29,258		32,733	N/A	N/A		**2,493**	30,737	33,230		
Nutritional Assessments Conducted	1,451	1,550	2,424	156%	167%		**208**	1638	1,846	1,550	119%
Transportation							**May**				
Total Ride Count	91,196	94,000	85,305	91%	94%		**6,622**	92,482	99,104	90,000	110%
Dial-A-Ride Count	30,644	31,020	30,025	97%	98%		**2,524**	29,121	31,645	30,000	105%
City, Commuter and Other Ride Count	60,552	62,980	55,280	88%	91%		**4,098**	63,361	67,459	60,000	112%
Eagle Transit Outreach/Special Events	8	10	40	400%	500%		**7**	35	42	15	280%
Information and Referral/Assistance							**June**				
Info and Referral/Assistance Contacts	19,586	18,000	17,523	97%	89%		**1,714**	17,715	19,429	18,000	108%
Independent Living			38%				**May**				*86%*
Homemaker Units of Service	1,616	3,333	784	24%	49%		**215**	1623	1,838	2,500	74%
Escorted Transportation Units of Service	1,548	2,186	792	36%	51%		**226**	1883	2,109	1,739	121%
Respite Units of Service	2,600	3,315	992	30%	38%		**160**	1768	1,928	2,468	78%
Community Support/Senior Companion Units of Service	1,322	1,090	1,060	97%	80%		**124**	1090	1,214	1,353	90%
Personal Care Units of Service	1,150	465	358	77%	31%		**20**	194	214	435	49%
Benefits Counseling							**June**				
Benefits Counseling Hours of Service	N/A	N/A	600	N/A	N/A		**36**	466	502	450	112%
Ombudsman							**June**				
Ombudsman consults/cases opened	1454	1,100	1,034	94%	71%		**73**	1177	1,250	1,100	114%