Report to the Commissioners
Area IX Agency on Aging, Flathead County
March 16, 2020
Prepared by Lisa Sheppard, Director

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

FY 2018 actuals
FY 2019 annual targets
FY 2019 actuals
FY 2019 actuals as a percentage of annual targets
FY 2019 actuals as a percentage of FY 2018 actuals
FY 2020 actuals to date
FY 2020 annual targets
FY 2020 actuals as a percentage of FY 2020 annual targets

The general target is 66.66% for FY 2020 to date, July 1, 2019-February 29, 2020, 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:

- DPHHS has resolved many but not all of the data entry and reporting problems associated with the new state database system.
- **Nutrition**
  - We have increased outreach for the MOW program as we have the capacity to serve additional participants and are now outpacing the target for the year as well as last year's actuals.
- **Transportation**
  - After school program ridership continues to be down from this time last year due to the elimination of the Kalispell City Parks and Rec rides. However, increased ridership on the Kalispell Green, Red and Orange city bus lines continues to hold steady, putting us just under the pace of total ridership from FY 2019. Fare free service in February (now extended through March) has had a significant positive impact on fixed route ridership over this time last year.
  - Ridership on the fixed and commuter routes continue to substantially exceed the target. Paratransit ridership continues to be under target due in part to the changes in fixed route service in Kalispell that make it easier for DAR passengers to ride the fixed route.
- **Information and Referral/Assistance**
  - **Outreach/Education** efforts continue to successfully target Medicare beneficiaries to connect them with additional benefits.

- **Independent Living Services**
  - The total "units of service" for all services combined continue to be substantially below target due to industry-wide paid caregiver shortages, which is now being affected by COVID-19. We continue to work internally and with our home care provider agencies to develop other strategies.
- **Benefits Counseling**
  - As expected, the cost savings for clients and hours of service have exceeded the annual target due to Medicare Open Enrollment October-December.
- **Ombudsman**
  - The program continues to undergo review and potential restructuring at the state level.

AOA Administration

COVID-19 Response

- We are participating in a conference call this afternoon at 2:00 between DPHHS and all of the agencies on aging in Montana to obtain the latest guidance. As of Friday, an emailed memo from DPHHS seemed to be deferring to local health departments regarding closures or suspension of service but suggested agencies on aging/senior centers/congregate meal sites implement screening measures if they remain open (i.e. asking people to stay away if they have been traveling, are sick, have been in contact with someone who is sick, etc.).
- However, given the greater susceptibility of older adults to the virus and to serious illness and death if infected and in light of the CDC's latest directives to cancel large gatherings and for older adults to limit social contact, we are suspending congregate meals and directing senior centers to discontinue group activities starting today until further notice. Other centers in Montana have also closed, and these precautions are in line with the national trend. AOA staff have contacted all senior centers and the Lakeside Chapel meal site.
  - For now, we are continuing home-delivered meal service as usual, and are informing all congregate meal clients they may be eligible for home-delivered service and/or take-home frozen meals.
    - We have sufficient inventory at this time and have been in contact with all of our usual suppliers/vendors.
    - We are in the process of assessing how many of our current Meals on Wheels volunteers are able and willing to continue doing deliveries as many of them are older adults themselves. We will use staff as necessary to fill in.
  - DPHHS has confirmed we can use our funds to support alternatives to congregate meals, including hot and/or frozen "take home" meals, increased home-delivered meals, bulk meal provision (days/weeks worth of meals delivered or picked up at one time), purchased shelf-stable meals, simplified menus, etc. As part of the declared emergency we can also provide meals to those under 60 if all other options have been explored.
- Delivery of individual services, such as benefits counseling, will continue. However, we will be doing as many appointments by phone as possible and will avoid home visits unless absolutely necessary. We will ask clients screening questions before arranging face-to-face contact. We are also asking all of our office volunteers who are older adults to stay home.
- We understand from our contracted home care providers that they are increasingly short-staffed as employees are ill or fear becoming ill. We are monitoring the situation.
- We are also continuing to closely monitor transit responses nationally and statewide and to be in close contact with MDT. So far, we have not changed or reduced any routes/services, but some older adults and people with disabilities are beginning to cancel paratransit/Dial-A-Ride rides. We

anticipate more will do so now there are confirmed cases in Montana. We have developed reduced route/service scenarios to implement in the event of staff shortages, and are taking the following steps to mitigate risk:

- Daily disinfecting of all buses and offices
- Weekly deep cleaning of offices
- Deep cleaning of buses scheduled this week and next
- Posting of CDC info for staff and on buses and website
- Ordered N95 masks for staff
- Ordered non-N95 masks for passengers who appear to be ill

Budget and Contracts

- We continue to work with Finance on the FY 2021 budget. We have not yet received federal allocations from DPHHS for FY 2021 and so are assuming flat funding for budget purposes. However, the recent reauthorization of the Older Americans Act includes a 7% increase.
- We received notice from DPHHS of amended federal allocations for FY 20, which resulted in some relatively minor increases and decreases in specific funds and a very small overall increase. We are in the process of developing an amended contract budget.

Building

- Nothing to report.

HR/Staff Development

- Staff are concerned about COVID-19 and have a lot of questions about what to do if they are ill, if the people we serve seem ill, how their leave/pay will be affected if they are ill or if we reduce service/temporarily close, etc.
- We continue to work with HR to restructure some existing positions and request new positions related to Older Americans Act/VA programs and transit increases.

State/Federal/Legislative Issues

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
  - Lisa did not attend the quarterly meeting in Helena in January. It is likely we will not meet in person in April due to COVID-19 concerns.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members
  - Legislatively n4a is focused on reauthorization of the Older Americans Act which expired at the end of September.
  - As of March 11, 2020, the House and Senate unanimously approved a bipartisan bill to reauthorize the Act for 5 years, called the Supporting Older Americans Act. It is awaiting presidential signature. Provisions include:
    - A seven percent funding increase for OAA programs in the first year, then annual six percent increases in the following years
    - Establishment of a National Research, Demonstration, and Evaluation Center for the Aging Network in the Office of the Assistant Secretary of HHS A
    - A study on the coordination of federal resources to promote the independence and safety of adults living at home as they age;

- More tailored support to family caregivers who play a vital role in helping aging Americans maintain their independence
- A stronger focus on addressing social isolation among seniors by empowering local organizations to test local solutions

AOA Advisory Council

- The Council met on March 12th. The agenda included an update on COVID-19 guidance and AOA/Eagle Transit preparation, update on the Census, discussion about member recruitment and a brainstorming session on new ways to celebrate Older Americans month (May).
- The next meeting will be May 14, 2020.

Outreach/Education/Media/Events

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

January 2020

1/6/2020: KGEZ monthly interview, 15,000
1/8/2020: BEC/SMP info distributed to all Meals on Wheels recipients/senior centers, 325
1/16/2020: Flathead Valley Veteran Services Providers meeting, 30
1/17/2020: Winter newsletter, 400
1/21/2020: 2EC/BEC Outreach event Mountain View Manor, 18
1/23/2020: Daily Inter Lake article, "Program gives veterans with health concerns independence, 'peace of mind,'" 17,500
1/24/2020: co-sponsor Shred Event at Veterans Food Pantry
1/28/2020: Medicare 101 Class, 7
1/31/2020: Winter Warm-up at Gateway Community Center, 200
January multimedia promotion of Medicare 101 class: 3000-17,500 per run
January BEC commercials on KGEZ: 48 ads per month, 15,000 per run

February 2020

2/3/2020: KGEZ monthly interview, 15,000
2/4/2020: Veterans Coalition meeting, 30
2/14/2020: NW Veterans Food Pantry meeting and distribution of materials, 60
2/18/2020: 2EC/BEC workshop at The Elms apartments, 13
2/20/2020: outreach at Bigfork Art and Cultural Center, 15
2/21/2020: 2EC/BEC workshop at Centre Court apartments, 20
2/24/2020: 2EC/BEC workshop at North Valley Senior Center and senior apartments in CFalls, 14
2/25/2020: Medicare 101
2/26/2020: 2EC/BEC workshop at Mountain View apartments, 7
2/26/2020: 2EC/BEC workshop at Stone Creek apartments, 8
2/26/2020: NW MT Care Transitions Coalition, 26
2/27/2020: AOA/BEC table at Kalispell Senior Center event, 20
2/29/2020: BEC and AOA ads in "Know Your Community" publication
February multimedia promotion of Medicare 101 class: 3000-17,500 per run
February BEC commercials on KGEZ: 48 ads per month, 15,000 per run

Eagle Transit

- Montana Department of Transportation (MDT):
  - Annual Transportation Coordination Plan/5311 Application/Capital Request submitted 2/24/2020
  - 5-Year Transportation Development Planning Grant

        - The grant expired on December 31, 2019.
        - We completed and submitted a draft report to MDT and expect to submit the final version shortly
- Outreach/Education/Media/Special Events:
    - To satisfy federal regulations, daily radio ads run on KGEZ in January and February.
    - We placed a half-page ad in the annual "Know Your Community" publication.
    - The Daily Inter Lake and Bigfork Eagle ran an article, "Transit operator explores ride options for Bigfork," which was also picked up nationally by Mass Transit Daily News
- Operations:
    - See above for COVID-19 response.
    - We are researching the possibility of converting our buses to propane as it would offer significant costs savings on fuel. This option is also of particular interest to the TAC.
    - We are now considering multiple options for expanded service for older adults and people with disabilities using Older Americans Act funds, including using Eagle Transit staff directly and developing/implementing a volunteer driver program.
        - Transportation Manager Tom Schneider has met with the Bigfork and Whitefish senior center boards about possibly partnering on a volunteer driver program. He has also approached the North Valley Center about setting up a time to speak with their board.
    - We have developed a general public and a business survey to be used in local communities to gauge interest in expanded service for older adults, as well as expanded general public and worker commuter service. We are working with local senior centers, chambers of commerce, etc. to distribute the survey.
    - As we did last year, we offered fixed route service at no charge for February. We saw an increase of approximately 1000 rides over February of last year, which was up dramatically from the year before. We've extended the fare free service through March.
- Staff Development/Training:
    - We're continuing to work with HR to restructure some positions.
- Transportation Advisory Committee (TAC)
    - The TAC is scheduled to meet on April 2, 2020, but it is likely we will postpone the meeting until summer due to COVID-19.
- Glacier National Park
    - A private company contracted by Glacier National Park to secure an operator for the summer 2020 shuttle service contacted us and requested a bid. After reviewing the scope of work and routes/staffing schedules provided, we determined the service as presented was not feasible and we declined to bid.

Nutrition

- We are in the process of finalizing our COVID-19 response but will likely suspend congregate meals shortly with delivery/pick-up alternatives.
- Annual surveys will be delayed because of COVID-19.

I & R/Assistance/Ombudsman/Independent Living Services

- Veteran Directed HCBS Program:
    - We have a total of 43 vets enrolled. Given the increase in the client census, we are in the process of adding a .5 Veteran Care Coordinator.
- Independent Living Services:

- Although we have begun to add clients to services, given the paid caregiver shortage, which is now exacerbated by COVID-19, we continue to explore other options meet client needs.
- Annual surveys will be delayed because of COVID-19.

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

- See above for COVID-19 response. See above for discussion of possible partnering with senior centers to implement a volunteer driver program.
- On 2/27/2020, Commissioners held a work session on the CDBG planning grant to explore options for the Bigfork Community Center.
- We're still waiting to hear about the CDBG Planning Grant application for the Bigfork Center.

March 2020 Report: Performance Measures Tables - February 2020 stats (FY 2020)

66.66%

MEASURE	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	February	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
# Receiving Independent Living Services	110	98	98	100%	89%	**6**	64	70	119	59%
# Receiving Meals on Wheels	374	465	401	86%	107%	**6**	381	387	465	83%
# Seniors Receiving Congregate Meals	1,404	1,200	1,538	128%	110%	**100**	1,267	1,367	1,200	114%
# Eagle Transit DAR Unduplicated Riders	331	450	333	74%	101%	**7**	234	241	450	54%
Client Savings from Benefits Counseling	N/A	N/A	N/A	N/A	N/A	**$59,587**	$477,745	$537,332	$400,000	134%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	92%	88%	93%	106%	101%	**91%**	92%	91%	88%	103%
Per Meal Cost of Nutrition Services	$6.29	$7.00	$6.80	97%	108%	**$6.12**	$5.82	$6.12	$7.00	87%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	95%	97%	102%	100%	**N/A**		0%	97%	0%
% Overall Satisfaction with Independent Living Services from Annual Survey	90%	95%	97%	102%	108%	**N/A**		0%	90%	0%
Maximum annual number of transportation complaints	12	36	4	11%	33%	**1**	12	13	25	52%
WORKLOAD INDICATOR	**FY 2018 Actuals**	**FY 2019 Target**	**FY 2019 Actuals**	**FY 2019 % of Target**	**FY 2019 as % FY 2018**		**Total Last Report**	**Total/Avg. to Date**	**FY 2020 Target**	**% Target**
Nutrition						**February**				
Total Meals	80,639	80,000	78,515	98%	97%	**7,513**	52,018	59,531	80,000	74%
MOW	47,409		46,658	N/A	N/A	**4,781**	32,112	36,893		
Social Dining (Congregate)	33,230		31,857	N/A	N/A	**2,732**	19,906	22,638		
Nutritional Assessments Conducted	1,846	2,000	1,858	93%	101%	**0**	1140	1,140	2,000	57%
Transportation						**February**				
Total Ride Count	99,104	90,000	116,017	129%	117%	**9,338**	65,682	75,020	100,000	75%
Paratransit/Dial-A-Ride Count	31,645	30,000	26,784	89%	85%	**2,095**	13,522	15,617	30,000	52%
City, Commuter and Other Ride Count	67,459	60,000	89,233	149%	132%	**7,243**	52,160	59,403	70,000	85%
Eagle Transit Outreach/Special Events	42	15	31	207%	74%	**3**	29	32	25	128%
Information and Referral/Assistance						**February**				
Outreach,Information, Referral Contacts	19,429	18,000	26,014	145%	134%	**1,740**	12,854	14,594	18,000	81%
Outreach/Education/Media Efforts	116	120	129	108%	111%	**16**	75	91	120	76%
Independent Living			66%			**February**				*34%*
Homemaker Hours	2,005	1,324	1,433	108%	71%	**155**	991	1,146	2,000	57%
Escorted Transportation Rides	2,314	1,391	886	64%	38%	**48**	432	480	2,174	22%
Respite Hours	2,079	3,250	1,793	55%	86%	**197**	720	917	2,857	32%
Comm. Support/Sr. Companion Hours	1,310	1,176	508	43%	39%	**48**	305	353	1,471	24%
Personal Care Hours	231	65	146	225%	63%	**11**	78	89	174	51%
Benefits Counseling						**February**				
Benefits Counseling Hours of Service	502	450	1,193	265%	238%	**46**	539	585	500	117%
Ombudsman						**February**				
Ombudsman consults/cases opened	1,250	1,100	1,116	101%	89%	**67**	581	648	1,000	65%