Flathead County agency on aging

Report to the Commissioners
prepared by Lisa Sheppard, Director
November 17, 2020

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

FY 2019 actuals
FY 2020 annual targets
FY 2020 actuals
FY 2020 actuals as a percentage of annual targets
FY 2020 actuals as a percentage of FY 2019 actuals
FY 2021 actuals to date
FY 2021 annual targets
FY 2021 actuals as a percentage of FY 2021 annual targets

The general target is 33.33% for FY 2021 to date, July 1-October 31, 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:

- **Nutrition**
  - Although the dining rooms at all sites remain closed, we continue to record "congregate" clients and meals each month as the meals provided to Meals on Wheels volunteers are considered congregate meals.
  - The continuing impact of COVID can be seen in both the number of Meals on Wheels clients and the number of meals served. We have 457 MOW clients so far this fiscal year, up from 299 this same time last year. Total meals served at this time last year were 27,766 compared to 32,852 this year, an 18% increase. We continue to be on track to serve approximately 100,000 meals this year at the current rate of demand (compared to what has been a fairly steady average of about 80,000 meals in recent years). Some clients may go off home-delivered service as COVID concerns ease, but many meet the normal criteria for the program and may continue indefinitely.
- **Transportation**
  - Rides continue to be down on all routes/services due to COVID generally (especially with the ongoing rise in cases in our area) and the suspension of fixed routes in Kalispell, the Tri-City Commuter and all Columbia Falls service at the end of September as a result of COVID-related staffing shortages. While staffing levels have recovered, we have shifted resources to

a General Public On Demand service in Kalispell, which, unlike fixed route service, is easily scalable in response to COVID concerns.

- We are working to rebuild ridership after transitioning from fixed routes to the General Public On Demand service. As with any major change in transit, it can take a while for passengers to learn and adjust to a new system. Average daily On Demand rides increased from 75 at the end of September to 121 in October, a 61% increase, with a single day high of 162. 309 unduplicated riders used the system in October.
    - Staff have projected we will reach 250, possibly up to 300 rides per day by the end of December.
    - Public response to the change continues to be very favorable.
    - As part of our ongoing research into On Demand as a potential permanent replacement for fixed route service, we are in the process of developing both an onboard survey and a general public survey in conjunction with our annual Transportation Coordination Plan effort to determine passenger and other stakeholder support for the model.
- We've resumed limited commuter service between Kalispell and Whitefish and anticipate offering full commuter service between the two cities shortly.
- We do not have plans at this time to resume commuter service to or fixed-deviated service within Columbia Falls due to extremely low demand prior to the recent suspension, but we continue to re-evaluate as circumstances evolve.

- **Information and Referral/Assistance**
    - I&R/A contacts continue to be high and we anticipate this is likely the "new normal" given both the aging demographic in our area as well as COVID-related concerns.
- **Independent Living Services**
    - The number of clients receiving Independent Living services continues to be at 65% of the target for the fiscal year. We have moved everyone off the waiting list and are accepting new clients at this time as a result of both natural attrition and some clients again asking to have their services temporarily suspended out of fear of virus exposure given the ongoing level of high case rates in the area.
    - As mentioned in previous reports, we did not conduct an annual survey in FY 2020 but will do so this fiscal year. We typically conduct our annual surveys in March.
- **Benefits Counseling**
    - Most savings are realized during Medicare Open Enrollment, which takes place October 15-December 7. However, we continue to be ahead of the FY 2020 pace by $38,553 (almost 42% higher than last year at this time).
    - The bulk of the annual service hours are also provided during Open Enrollment.
    - We continue to provide assistance via phone, email and fax, and the public can access our Medicare 101 class on our website.
- **Ombudsman**
    - Nursing homes and assisted living facilities are still mostly closed to outside visitors and some local facilities have experienced COVID outbreaks and multiple deaths related to the virus. As a consequence, Ombudsman staff continue to conduct all consults with facility staff, residents and families via phone, email or remote video conferencing. However, DPHHS recently put out draft rules to allow for in-person visiting under certain circumstances.
    - Consults are ahead of pace with much of the increase continuing to be directly related to COVID concerns.

See each section below for relevant updates on COVID Response. We are continually re-evaluating the status of all our programs. We have and will continue to consult with the Health Officer prior to making any substantive changes.

AOA Administration

Budget and Contracts

- We submitted a revised budget to DPHHS to include federal funds carried over from FY 2020 as well as a small amount of additional Title III, MIPPA, FFCRA and CARES Act funds. We just received a contract amendment, which we will send to Tara for review and then on to Commissioners for review/approval.
    - The $459,000 in carried over federal funds includes approximately $241,000 in FY 2020 Title III funds and $218,000 in CARES Act funds. We can carry forward Title III funds for three years. CARES Act funds must be spent by September 2021. We expect to expend all carried over funds by their respective deadlines.
- Staff submit monthly financial reports to DPHHS.
- We submitted the required federal fiscal year-end (September 30) annual performance measure report to DPHHS, as well as the required narrative report on CARES Act expenditures.
- We have received and will continue to receive additional federal funding for transit as part of the CARES Act.
    - MDT initially approved 100% reimbursement of expenses with CARES Act funds the last two quarters of FY 2020 with an extension through the first quarter of FY 2021. Recently the Department approved another extension through December 31, 2020.
    - MDT has not yet made an allocation by area but indicated they still may do so at some point in FY 2021.
    - The funds do not require a local match and are intended to be spent prior to regular funding allocations effective January 20, 2020.
    - MDT has not yet determined when funds must be spent and is not requesting a contract amendment at this time, but that may change. (See Eagle Transit section below for more detail.)

Building

- The CDC continues to recommend that older and vulnerable adults limit their interactions with others as much as possible and to take extra precautions when they do have contact. In light of this guidance and the case rate in the Flathead, we continue to keep our South Campus offices and dining room closed to the public. We are successfully providing service in other ways and are prepared to meet in person with clients when necessary.
- We are looking into a tablet-based system to allow no contact communication with those who come by in person.

HR/Staff Development

- We continue to have an open driver position at Eagle Transit.
- We have an open Aging Services Program Manager position.
- We have hired Dale Novak as Interim Transportation Manager while we determine how best to move forward with the position.
- We continue to work with HR to restructure some existing positions and request new positions related to changing needs and Older Americans Act and transit budgets.

State/Federal/Legislative Issues

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
    - M4A continues to work closely with the DPHHS State Unit on Aging (SUA) to resolve ongoing funding and structural issues with the federally mandated Ombudsman Program. A new State Ombudsman has been hired.
    - We meet as an association monthly via conference call and have a joint call with SUA every other month.
    - We are preparing for the upcoming legislative session.
    - Work is proceeding on M4A's statewide needs assessment funded by a grant from the Administration on Community Living (ACL).
- 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 us as members
    - Current efforts are focused on securing the inclusion of Title III and other aging services funding in any future COVID relief packages as well as advocating for aging services in annual federal budgets.
        - Current federal funding authority expires on December 11th. Congress must either pass a full FY 2021 budget or a continuing resolution.
        - The House budget includes expanded funding for OAA services. The recently released Senate version hold funding flat.

AOA Advisory Council

- The Council met via Zoom on November 12th. Topics included program updates and COVID response status.
- The Council voted to move from bi-monthly to quarterly meetings through FY 2021 (as is allowed by the Older Americans Act and Council by-laws) and will re-evaluate whether to resume more frequent meetings at that time.

Outreach/Education/Media/Events

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

- 10/1/2020: Quarterly newsletter; 1400
- 10/5/2020: KGEZ monthly interview about AOA services and aging concerns; 15,000
- 10/5/2020: distributed Senior Medicare Patrol information to Meals on Wheels recipients; 325
- Medicare Open Enrollment outreach:
    - 10/4/2020: Daily Inter Lake; 15,652
    - 10/7/202: Hungry Horse News; 6500
    - 10/7/2020: Bigfork Eagle; 1600
    - 10/7/2020: Whitefish Pilot; 4000
- 10/8/2020: presentation to Kalispell Noon Rotary, 25
- 10/14/2020: M4A tele-townhall, 291 attendees from Flathead County
- 10/18/2020: Daily Inter Lake brief on need for Meals on Wheels drivers; 15,652
- 10/19/2020: public comment to Montana Housing Board in support of senior housing project in Kalispell; 45
- 10/29/2020: provided information on older adults and mental health for Health Department's Mental Health Systems Mapping exercise
- 10/30/2020: information distribution through West Shore Food Bank
- 10/31/2020: Daily Inter Lake AOA general outreach ad; 15,652

- October 2020: KGEZ, 48 ads per month, Benefits CheckUp
- Medicare 101 class available on AOA website; # views not yet available

Eagle Transit

- COVID:
  - On 9/28/20, we suspended all fixed route city buses and paratransit in Kalispell, the Tri-City Commuter and the fixed-deviated route in Columbia Falls due to a positive COVID case on a Dial-A-Ride bus and COVID-related staffing shortages.
    - We immediately replaced fixed/paratransit service in Kalispell with a General Public On Demand system which we plan to keep in place at least for the time being as it is easily scalable in response to COVID concerns.
    - We have resumed limited commuter service from Kalispell to Whitefish and plan to provide full service shortly.
    - We do not anticipate resuming commuter or in-city service for Columbia Falls at this time due to extremely low demand that predates COVID.
  - We are encouraging onboard distancing as long as demand allows. Drivers are wearing masks and passengers are notified to do so per the Governor's directive. Enhanced cleaning of vehicles continues.
  - We continue to be fare free to mitigate the risk of transmission through money exchange and to reduce the administrative burden on staff, but we are in the process of evaluating alternatives for fare collection in conjunction with On Demand technology (see below).
- Montana Department of Transportation (MDT) and Federal Transit Administration (FTA):
  - COVID-related funds:
    - Per FTA guidance, MDT reimbursed all expenditures from January 20 – Jun e 30 2020 with CARES Act funds at 100%. They then extended the 100% reimbursement through December 31, 2020. No local match is required and no reduction is made for fare collections.
    - We can request additional payment for any operational costs above $5,000 that support us to prevent, respond to or prepare for COVID-related concerns or conditions (including negative economic impact on the community and/or the transit system itself) now and going forward. We have worked with MDT on several projects, including vehicle repairs.
    - MDT has set aside some of the CARES Act funds for facility and other capital purchase/construction. We have been working with MDT on several projects with the purchase of area shelters as a first priority, followed by ADA updates and remodel of the existing facility. Other potential projects include a bus barn addition, propane conversion (on hold) and a transfer station in Kalispell (on hold).
      - The next step in shelter acquisition is to complete an independent business valuation, to be paid for with MDT planning grant funds. A CPA has been selected and a contract will be available shortly for Commissioner review/approval.
  - Quarterly financial, program and vehicle reports were submitted to MDT at the end of October.
  - Annual financial and program statistics were entered into the FTA's National Transit Database (NTD) at the end of October and are awaiting initial review by MDT.
- Planning
  - Annual Transportation Coordination Plan/5311 Application/Capital Request:
    - The plan, application and related documents are due March 1, 2021.

        - We anticipate MDT will notify us about our funding allocation by mid-December.
        - We will be working to solicit public and stakeholder input in November and December, including surveys, virtual meetings and opportunities for online comment. We do not anticipate holding an in-person public meeting due to COVID.
    - We are participating in the Transportation Plan updates for the cities of Kalispell, Whitefish and Columbia Falls and have met multiple times with the consultant working on these projects.
- Outreach/Education/Media/Special Events:
    - To satisfy federal regulations, daily radio ads ran on KGEZ.
- Operations:
    - We anticipate shortly requesting Commissioner approval for Eagle Transit to become its own county department, separate from AOA.
    - Welcome to Dale Novak who is serving as interim Transportation Manager.
    - We are continuing to work on the following projects.
        - On Demand technology: We continue to explore new technology to better manage and support our demand response system, which we were pursuing prior to COVID but which has become increasingly critical in light of our transition from fixed route service to General Public On Demand in response to COVID. As noted last month, we've researched options and pricing from both VIA and Uber (which recently acquired RouteMatch) and are currently participating in a series of meetings with both vendors regarding system specifics and contracting details.
            - There are no other transit systems in Montana using either system yet, but MDT is very interested in them as possible solutions for rural transit systems like ours.
            - If we move forward with either technology, it will replace our current RouteMatch system.
        - Mountain Climber rebranding: We have finalized the design elements as well as the bid/quote process for the bus wraps and new website and are ready to move forward with next steps.
        - Seasonal commuters: Big Mountain Commercial Association has agreed to make a donation to support a Saturday commuter from Kalispell to the mountain this winter. This would be a public transportation route open to all members of the public. The service would not duplicate or supplant current Snow Bus service or have an adverse economic impact on the Snow Bus contractor, Rocky Mountain Transportation, nor would it compete with another private service. We met with Snow Bus staff on November 9th to decide whether to move forward with this project give some previous logistical concerns, which we were able to work through. Service would begin December 12th and end April 10th.
    - Volunteer driver program: As noted last month, we are putting this effort on hold for now, due to a combination of factors, including COVID and the potential impact on recruiting volunteers, staff capacity required to implement the On Demand system and the need to fill the manager position.
    - The SPARKS after school route is operating on the same schedule as last year (prior to the schools closing due to COVID).
- Staff Development/Training:
    - We are looking to engage an executive recruiting service to hire the new manager. We have met with two services so far and in the process of connecting with a third and obtaining written bids.

- The new manager will have the opportunity to work with HR to, with Commissioner approval, restructure some positions and add permanent and temporary positions in line with our FY 2021 budget as submitted to MDT.

- Transportation Advisory Committee (TAC)
  - The next meeting will be held via Zoom on Wednesday, December 9th from 10:30-noon to obtain TAC input on the annual Transportation Coordination Plan.
- Glacier National Park
  - We are waiting for the release of the white paper from the Volpe National Transportation Center (part of USDOT).
  - We plan to meet with GNP management and the Park's national transportation fellow at some point this winter to discuss what we've all learned managing transit/visitors/COVID this past year and how we might move forward in engaging Flathead stakeholders about an integrated system.

Nutrition

- COVID:
  - All protocols reported last month continue to be in place.
  - We made arrangements to purchase Subway meals to be delivered by our volunteers should our own staff, or senior center staff, be unable to prepare meals as a result of COVID.
    - We used this option recently in the Whitefish area.
- We continue to re-evaluate the status of our dining rooms on a monthly basis.
  - At this time, we have decided to remain closed for onsite dining at the South Campus due to the increased staff resources needed to manage the volume of home-delivered meals (which we anticipate would only decrease slightly if onsite dining resumed) and the continued COVID risk to diners and staff. An outbreak among staff would likely jeopardize our Meals on Wheels program, which would in turn create a substantial hardship for many of our most vulnerable clients.
  - All senior centers remain closed to onsite dining.
    - The Whitefish Community Center will be closed for repairs starting today for 6-8 weeks. The Center has made arrangements to use a local church during that time to prepare meals for home delivery.

I & R/Assistance/Ombudsman/Independent Living Services

- COVID: All of the protocols reported last month remain in place.
- National Council on Aging Benefits Enrollment Center (BEC) grant continuation (October 1,2020-September 30, 2021): This grant is awarded annually. We implement the grant in partnership with the Area VI Agency on Aging (Polson). Our portion of the grant award is $27,000. The grant supports outreach and assistance to low-income Medicare beneficiaries to identify and enroll in programs that reduce their costs related to Medicare premiums, co-pays, out-of-pocket expenses, prescription drugs, home heating costs, etc.
- Medicare Open Enrollment runs from October 15th -December 7th. Staff are keeping us a brisk pace of appointments. Our process due to COVID is as follows:
  - We are mailing those who request assistance a packet of information that explains the process and has forms for them to fill out and send back to us. They can mail the forms or hand deliver it to our drop box.
  - Once staff receive the forms, they will make a phone appointment for the person and research the person's options given the information they submitted so they will have everything ready to ensure the appointment goes smoothly.

    - Staff will follow up with people via phone and email as needed until they are ready to make their annual selections.
    - We'll also complete Benefits CheckUp screenings at the same time.
- Veteran Directed Care (VDC) Program:
    - On 9/26/20, along with the other three Area Agencies on Aging in Montana that are VDC providers, we met via Zoom with the Ft. Harrison staff in charge of the program. They have substantially changed the eligibility rules of the program which will make it very difficult for vets to enroll going forward. Only a handful of vets have been able to access the program statewide under the new rules, and none of them have been from Flathead County. We are exploring our options for raising the issue further at the national level as this change appears to be exclusively a decision made by the VA in Montana.
    - We did receive one new referral in October.
    - We continue to have 32 vets enrolled, down from a high of 43 in February. Some vets have passed away. Others have been denied continued enrollment at their 6-month reauthorization. We are offering vets assistance with their appeals.
- Independent Living Services:
    - As previously noted we have put everyone on the waiting list onto services and are taking new client requests.
- Caregiver Support:
    - Staff have launched Trualta, our new online support platform for caregivers, with a select group of caregivers to pilot the service.
    - We continue to explore ways to provide Powerful Tools for Caregivers training virtually.
- Emergency Planning: We are ready to begin providing individualized emergency planning services and "Go/Stay" backpacks to older adults in the Flathead, funded through a grant from Blue Cross Blue Shield of Montana. We are starting with our existing clients and will branch our as we have capacity.
- Ombudsman Program:
    - As noted above, several care facilities are experiencing COVID outbreaks and resident deaths. The state has issued draft policies that would allow ombudsmen to visit with residents under certain circumstances following specific safety protocols. However, given the current situation in Flathead County, it is unlikely we will engage in any in-person visitation in the near future.

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

- AOA staff are still working on the FY 2021 agreements with the Centers and expect to have them ready for Commissioner review/approval shortly.
- COVID:
    - All dining rooms remain closed for congregate meals.
    - The Kalispell Senior Center (KSC) continues to offer onsite activities, some at the South Campus and some at the Country Kitchen at the Fairgrounds (when the space is available).
    - The North Valley Senior Center is offering toenail clinics and other limited activities.
    - Neither the Whitefish Center nor the Bigfork Center are offering activities at this time.
- Bigfork Community Center:
    - The CDBG Planning Grant process is moving forward.
- Whitefish Community Center is closed for repairs and using a local church to prepare meals for home delivery.

November 2020 Report: Performance Measures Tables - October 2020 stats (FY 2021)

33.33%

MEASURE	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	October	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
# Receiving Independent Living Services	98	119	86	72%	88%	**0**	72	72	110	65%
# Receiving Meals on Wheels	401	450	554	123%	138%	**27**	430	457	450	102%
# Seniors Receiving Congregate Meals	1,538	1,400	1,408	101%	92%	**6**	142	148	1,400	11%
# Eagle Transit DAR Unduplicated Riders	333	335	266	79%	80%	**309 riders in Oct**	148	148	335	44%
Client Savings from Benefits Counseling	N/A	$400,000	$623,758	156%	N/A	**$52,646**	$130,603	$183,249	$500,000	37%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	93%	88%	87%	99%	94%	**88%**	90%	88%	88%	100%
Per Meal Cost of Nutrition Services	$6.80	$7.00	$7.65	109%	113%	**$6.39**	$5.73	$6.39	$7.50	85%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	97%	100%	103%	103%	**N/A**	N/A	N/A	97%	N/A
% Overall Satisfaction with Independent Living Services from Annual Survey	97%	90%	moved to next FY	N/A	N/A	**N/A**	N/A	N/A	90%	N/A
Maximum annual number of transportation complaints	4	25	15	60%	375%	**2**	11	13	25	52%
WORKLOAD INDICATOR	**FY 2019 Actuals**	**FY 2020 Target**	**FY 2020 Actuals**	**FY 2020 % of Target**	**FY 2020 as % FY 2019**		**Total Last Report**	**Total/Avg. to Date**	**FY 2021 Target**	**% Target**
Nutrition						**October**				
Total Meals	78,515	80,000	90,538	113%	115%	**8,085**	24,767	32,852	80,000	41%
MOW	46,658		62,696	N/A	N/A	**6,903**	20,997	27,900		
Social Dining (Congregate)	31,857		27,842	N/A	N/A	**1,182**	3,770	4,952		
Nutritional Assessments Conducted	1,858	2,000	1,311	66%	71%	**43**	1066	1,109	1,800	62%
Transportation						**October**				
Total Ride Count	116,017	100,000	88,395	88%	76%	**3,892**	15,011	18,903	100,000	19%
Paratransit/Dial-A-Ride Count	26,784	30,000	20,971	70%	78%	**2,789**	4,039	6,828	30,000	23%
City, Commuter and Other Ride Count	89,233	70,000	67,424	96%	76%	**1,103**	10,972	12,075	70,000	17%
Eagle Transit Outreach/Special Events	31	25	41	164%	132%	**1**	8	9	30	30%
Information and Referral/Assistance						**October**				
Outreach,Information, Referral Contacts	26,014	18,000	23,823	132%	92%	**2,321**	7,360	9,681	18,000	54%
Outreach/Education/Media Efforts	129	120	139	116%	108%	**16**	31	47	120	39%
Independent Living			57%			**October**				*31%*
Homemaker Hours	1,433	2,000	1,853	93%	129%	**195**	656	851	1,430	60%
Escorted Transportation Rides	886	2,174	747	34%	84%	**59**	162	221	1,500	15%
Respite Hours	1,793	2,857	1,757	61%	98%	**106**	535	641	2,142	30%
Comm. Support/Sr. Companion Hours	508	1,471	383	26%	75%	**0**	0	0	750	0%
Personal Care Hours	146	174	183	105%	125%	**32**	94	126	150	84%
Benefits Counseling						**October**				
Benefits Counseling Hours of Service	1,193	500	694	139%	58%	**90**	63	153	650	24%
Ombudsman						**October**				
Ombudsman consults/cases opened	1,116	1,000	1,406	141%	126%	**122**	368	490	1,000	49%