

Report to the Commissioners

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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 16.66% for FY 2021 to date, July 1-August 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 401 MOW clients so far this fiscal year, up from 242 this same time last year. Total home-delivered meals served to date last year were 8,437 compared to 14,093 this year. We’ve served 2,354 more meals total this year over last, an increase of 17%. 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. August rides are slightly lower than July rides (4%).

- August 2020 rides were 66% of rides compared to August of last year, and 58% of the pre-COVID monthly average (excluding rides related to the Glacier National Park Cooperative Agreement).
 - Fixed route rides are higher this month than last and are 78% of the total rides in August 2019.
 - Fixed-deviated rides are down this month from last and are at 36% of the total for July 2019, primarily due to decrease in demand/service in Columbia Falls. Rides in Whitefish are 64% of the total at this time last year.
 - Paratransit/Premium Dial-A-Ride rides are also down this month and are at 66% of the August 2019 total. The number of unduplicated paratransit/DAR passengers is down 24% from this time last year.
- Complaints were higher than normal again this month.
- **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 is at 64% of the target for the fiscal year. However, we are at the maximum number of clients we can serve at one time based on our most recent FY 2021 estimates given the available budget and the number of monthly units of service approved for current clients. We have a waiting list for new clients. We were able to put a few of the individuals on the waiting list onto service this month as capacity was freed up by existing clients going off service or reducing hours used.
 - 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-December. However, we are ahead of the FY 2020 pace.
 - 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 several facilities are currently experiencing 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.
 - 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-19 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 have completed year-end financial reports and have been working with Finance on audit prep.
- We submitted year-end financial reports/reconciliation to DPHHS and MDT.

- Commissioners approved the FY 2021 DPHHS contract on 9/8/20. Total federal funds are \$448,498 (\$4,574 higher than our original FY 2020 allocation); state funds are flat at \$412,136. We will submit a request shortly to DPHHS to amend the budget to reflect the ongoing suspension of congregate meal service and the \$459,000 in federal funds to be carried forward from FY 2020 into FY 2021, 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.
- We have received and will continue to receive additional federal funding for transit as part of the CARES Act. MDT still has not yet made an allocation by area but have indicated they 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 closed to the public. We are successfully providing service in other ways and are prepared to meet in person with clients when necessary.

HR/Staff Development

- We have filled two of the open driver positions at Eagle Transit.
- 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 increases.

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.
 - 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.
- 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

AOA Advisory Council

- We met via conference call on September 10th to discuss COVID-related service updates, Eagle Transit rebranding, the September “Benefits Blast,” Open Enrollment plans and new emergency planning services.
- Participation in meetings has been very low the last two meetings due to COVID. Membership is also down, but given challenges related to COVID the group decided at the July meeting to table its own recruitment efforts until next year.
- Our next regularly scheduled meeting is November 12th and will be held via Zoom or conference call.

Outreach/Education/Media/Events

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

- 8/4/2020: KGEZ monthly interview about AOA services and aging concerns; 15,000
- 8/6/2020: presentation to North Valley Food Bank staff (8); Food Bank will insert our “Benefits Blast” fliers into food boxes provided to older adults
- 8/11/2020: submitted public comment to the Kalispell City Council in support of a housing study
- 8/15-8/26/2020: multi-media promotion of “Benefits Blast” to Medicare beneficiaries; 500
- 8/26/2020: service update to Northwest Montana Care Transitions Coalition; 27
- 8/26/2020: scam alert article for Whitefish Community Center newsletter: 300
- 8/26/2020: “Benefits Blast” ad in Whitefish Community Center newsletter; 300
- August 2020: KGEZ, 48 ads per month, Benefits CheckUp
- Medicare 101 class available on AOA website; 45 visits

Eagle Transit

- COVID: All fixed route city buses in Kalispell, paratransit/Premium Dial-A-Ride, the Whitefish city bus and the Tri-City Commuter are running on a normal schedule. Columbia Falls continues on a reduced once a week schedule. 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.
- Montana Department of Transportation (MDT) and Federal Transit Administration (FTA):
 - COVID-related funds:
 - Per FTA guidance, MDT reimbursed all expenditures from January 20th to June 30th with CARES Act funds at 100%. They extended the 100% reimbursement for the 1st quarter of FY 2021. No local match is required and no reduction is made for fare collections. We do not yet know if the 100% reimbursement rate will continue to apply to the quarter beginning October 1st.
 - We can request additional payment for any operational or capital costs 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 continue to be in discussion with MDT about several projects (see below).
 - MDT is setting aside some of the CARES Act funds for facility and other capital purchase/construction. We are working with MDT on several potential projects, including the purchase of area shelters.
- Outreach/Education/Media/Special Events:
 - To satisfy federal regulations, daily radio ads ran on KGEZ.
- Operations:
 - Eagle Transit Manager Tom Schneider and Dispatcher Elizabeth Wood traveled in August to Idaho to visit three separate transit systems to learn more about commuter service in a ski resort area, a Medicaid rider program, a volunteer driver program and a new general public demand response system using VIA, an on-demand scheduling service/platform.
 - We have been researching new technology/partnerships to support a general public demand response system, including options from both VIA and Uber (which recently acquired RouteMatch). 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. We are moving forward with the next step of getting an analysis/quote from them based on the specifics of our system and geography.

- We're continuing to move forward with Mountain Climber rebranding efforts. We have been soliciting stakeholder input and have selected the compass logo and bus wrap design that features a summer hiking scene on one side and winter skiing scene on the other. We will work with the design firm to finalize the design elements shortly and will begin scheduling the buses for wrapping.
- The SPARKS after school route resumed at the start of the new school year. At this time, the plan is to operate as we did last year prior to the schools closing due to COVID.
- We continue to work with MDT re. the funding and logistics of converting our buses to propane, which was identified as a TAC priority in our FY 2021 Transportation Coordination planning process. We anticipate it will generate substantial operational savings in the years to come. The state is supportive of the effort but we have not yet reached an agreement regarding funding. If we are able to secure the funding, we will request Commissioner approval to use additional county land to the south of the current bus barn to install the tank and road access to the tank.
- We continue to explore/make progress on the following:
 - Implementation of a volunteer driver program – We continue to do research and planning related to this project but have decided to postpone making a decision until spring/summer of 2021, and possibly into next fiscal year given COVID and the number of other projects in process.
 - Seasonal summer/winter commuter routes
 - Exploration of general public demand response options and related technology to increase service flexibility
- **Staff Development/Training:**
 - We're continuing 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 8/6/2020 TAC meeting was canceled due to scheduling conflicts.
 - We will conduct our annual meeting and officer elections via Zoom on October 1st.
- **Glacier National Park**
 - We are still waiting for the completion/release of the white paper from the Volpe National Transportation Center (part of USDOT) commissioned by Superintendent Mow to summarize previous plans as a starting point for a transportation work group convened by GNP to include regional, state and local stakeholders.

Nutrition

- **COVID:** All protocols reported last month continue to be in place.
- 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.
- We have enough disposable Meals on Wheels supplies to last us through the winter. We will re-evaluate whether to return to re-usable containers at that time as the disposable items are very expensive.

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 grant continuation: This 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. Our current grant expires at the end of this month. We will submit a renewal application, in partnership with the Area VI Agency on Aging (Polson), by October 9th. If awarded, we anticipate receiving approximately \$27,000, effective October 1, 2020-September 30, 2021.
- We've designated September as "Benefits Blast" month to reach out to Medicare beneficiaries in multiple ways to encourage them to contact us for a free Benefits CheckUp designed to help those with low incomes access other benefits that can help them with Medicare premium payments, out-of-pocket health care expenses and drug costs as well as things like energy assistance and home-owner/renter tax credits. We also help those who appear to be eligible complete Medicaid applications.
- We've developed a new process for Medicare Open Enrollment, which runs from October 15-December 7:
 - We are making phone appointments for those requesting assistance.
 - Prior to their appointment, we are sending them 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 do the research to determine what the person's options are given the information they submitted, so they will have everything ready for the scheduled phone appointment.
 - 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.
- Community Needs Assessment: We've begun to send out the results to a variety of stakeholders.
- Veteran Directed Care (VDC) Program:
 - New enrollments are still suspended by the VA. Directors of the three Area Agencies on Aging in Montana that offer the service recently sent a joint letter to the VA in Ft. Harrison requesting a meeting. They have not yet responded.
 - We continue to have 33 vets enrolled, down from a high of 43 in February. Some vets are being denied continued enrollment at their 6-month reauthorization. We are assisting these vets with their appeals.
- Independent Living Services:
 - As previously noted, we are at capacity given the new fiscal year budget and the number of total approved hours of service for all IL clients, and we have re-balanced our service mix to focus more heavily on home-maker and respite services.
- Caregiver Support:
 - Staff are preparing to launch 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.
- 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.
- 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 offer toenail clinics and other limited activities.
 - Neither the Whitefish Center for the Bigfork Center are offering activities at this time.
- Bigfork Community Center:
 - Negotiations continue regarding the Center's potential use of the Community Methodist Church.
- The CDBG Planning Grant is moving forward.

September 2020 Report: Performance Measures Tables - August 2020 stats (FY 2021)

16.66%

MEASURE	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	August	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
# Receiving Independent Living Services	98	119	86	72%	88%	3	67	70	110	64%
# Receiving Meals on Wheels	401	450	554	123%	138%	24	377	401	450	89%
# Seniors Receiving Congregate Meals	1,538	1,400	1,408	101%	92%	7	132	139	1,400	10%
# Eagle Transit DAR Unduplicated Riders	333	335	266	79%	80%	18	113	131	335	39%
Client Savings from Benefits Counseling	N/A	\$400,000	\$623,758	156%	N/A	\$35,521	\$35,552	\$71,073	\$500,000	14%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	93%	88%	87%	99%	94%	90%	90%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.80	\$7.00	\$7.65	109%	113%	\$5.59	\$3.73	\$5.59	\$7.50	75%
% 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%	4	6	10	25	40%
WORKLOAD INDICATOR	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	August	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
Nutrition						August				
Total Meals	78,515	80,000	90,538	113%	115%	7,976	8,607	16,583	80,000	21%
MOW	46,658		62,696	N/A	N/A	6,725	7,368	14,093		
Social Dining (Congregate)	31,857		27,842	N/A	N/A	1,251	1,239	2,490		
Nutritional Assessments Conducted	1,858	2,000	1,311	66%	71%	36	1030	1,066	1,800	59%
Transportation						August				
Total Ride Count	116,017	100,000	88,395	88%	76%	4,747	4,970	9,717	100,000	10%
Paratransit/Dial-A-Ride Count	26,784	30,000	20,971	70%	78%	1,360	1,589	2,949	30,000	10%
City, Commuter and Other Ride Count	89,233	70,000	67,424	96%	76%	3,387	3,381	6,768	70,000	10%
Eagle Transit Outreach/Special Events	31	25	41	164%	132%	1	2	3	30	10%
Information and Referral/Assistance						August				
Outreach, Information, Referral Contacts	26,014	18,000	23,823	132%	92%	2,271	2,254	4,525	18,000	25%
Outreach/Education/Media Efforts	129	120	139	116%	108%	9	11	20	120	17%
Independent Living			57%			August				19%
Homemaker Hours	1,433	2,000	1,853	93%	129%	207	242	449	1,430	31%
Escorted Transportation Rides	886	2,174	747	34%	84%	60	74	134	1,500	9%
Respite Hours	1,793	2,857	1,757	61%	98%	173	331	504	2,142	24%
Comm. Support/Sr. Companion Hours	508	1,471	383	26%	75%	0	0	0	750	0%
Personal Care Hours	146	174	183	105%	125%	23	40	63	150	42%
Benefits Counseling						August				
Benefits Counseling Hours of Service	1,193	500	694	139%	58%	18	17	35	650	5%
Ombudsman						August				
Ombudsman consults/cases opened	1,116	1,000	1,406	141%	126%	124	128	252	1,000	25%