

County of Milwaukee
Inter-Office Communication

Date: August 20, 2012
To: Peggy Romo West, Chair, Health and Human Needs Committee
From: Stephanie Sue Stein, Director, Department on Aging
Subject: Overview of 2013 Budget Request from Department on Aging

Attached please find copies of the Requested 2013 Budget for Org Unit 7900 as submitted by Milwaukee County Department on Aging (MCDA).

The requested budget for 2013 covers Administration (Director's Office and Fiscal and Support Services Division), Area Agency Services Division, and the Aging Resource Center. The 2013 budget request totals \$18,644,936 and includes a \$372,420 increase in expenditures, a \$372,421 increase in revenues, and no increase in tax levy.

Budget highlights include the following changes:

- A. \$215,284 increase in nutrition meal reimbursement; Department of Family Care continues purchasing meals for Family Care members through the Department on Aging Senior Meal Program. Meal reimbursement revenue increased \$545,961, partially offset by increased catering costs of \$330,677;
- B. \$208,450 decrease in Older Americans Act grant funding; \$11,711 increase in State s.85.21 transportation funding resulting, partially offset by \$7,708 decrease in State Pharmaceutical Assistance Program revenue; resulting in a net decrease of \$204,447;
- C. \$118,161 decrease in contractual short-term staffing; includes expenditure reduction of \$70,000 as MCDA Resource Center fills critical vacancies and further reduction of \$48,166 due to a projected increase in 100% time reporting revenue as Resource Center continues staff development and training regarding accurate and timely staff reporting for eligible reimbursable Medicaid and Medicare services;
- D. \$92,768 increase in elder abuse and protective services; includes (a) \$42,000 increase in temporary short-term expenditures for legal services, residential care, respite, and adult day care, and (b) \$50,768 in Corporation Counsel cross-charges for related legal services;
- E. \$92,263 increase in evidence based prevention program management; reflects \$17,263 revenue reduction from American Recovery and Reinvestment Act (ARRA) and \$75,000 increase in contractual fees.

Major programmatic changes include the following:

- A. Establish a coordinated, community based approach to care transitions that would include health care and social service partners. This approach is recognized throughout the nation as an effective strategy to improve health and lower medical costs;
- B. Implement the Active Aging Resource Center: Bringing Communities and Technology Together for Healthy Aging, a five-year grant project to assist in creating independence and quality of life for Milwaukee County seniors;

(2)

- C. Re-establish Medicaid Long Term Care entitlement and resume improvement to managed care organization enrollment processing; and
- D. Collaborate in a new initiative to provide a more comprehensive nursing home relocation effort.

Staffing changes include abolishing two currently vacant positions, including 1.0 FTE Human Service Worker (Bilingual Russian) position for a savings of \$56,822 and 1.0 FTE Services Support Specialist position for a savings of \$53,080, resulting in a total salary and active fringe benefit reduction of \$109,902.

If you have any questions, please contact me at 2-6876.

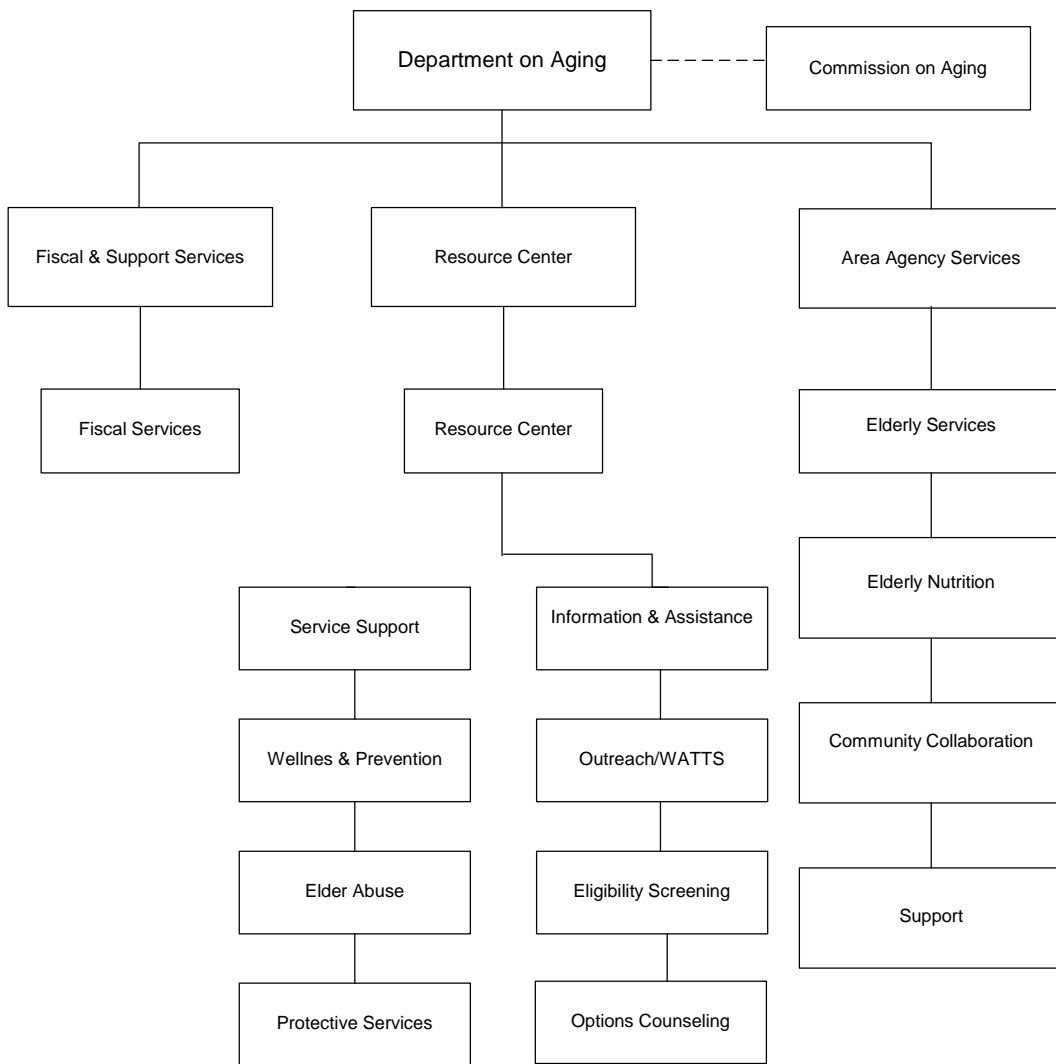


Stephanie Sue Stein, Director
Milwaukee County Department on Aging

Attachment

cc: County Executive Chris Abele
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DEPARTMENT ON AGING (7900)



REQUESTED 2013 BUDGET

DEPT: Department on Aging

UNIT NO. 7900
FUND: General - 0001

MISSION

The mission of the Milwaukee County Department on Aging (MCDA) is to affirm the dignity and value of older adults of this County by supporting their choices for living in and giving to our community.

Budget Summary		
	2013	2012/2013 Change
Expenditures	18,644,936	372,420
Revenue	16,728,679	372,421
Levy	1,916,257	(1)
FTE's	73.8	(3.3)

Major Programmatic Changes

- Establish a coordinated, community-based approach to care transitions that would include health care and social service partners. This effort is highly recognized throughout the nation as an effective strategy to improve health and lower medical costs.
- Implement the Active Aging Research Center: Bringing Communities and Technology Together for Healthy Aging, a five-year grant project to assist with creating independence and quality of life for Milwaukee County seniors.
- Re-establish Medicaid Long Term Care entitlement and resume improvement to managed care organization enrollment processing.
- Collaborate in a new initiative to provide a more comprehensive nursing home relocation effort.

OBJECTIVES

- Engage a new effort to target nursing home residents for relocation into the community.
- Using the Eight Dimensions of Wellness as a guide, the MCDA Wellness Council will continue developing unique partnerships with aging organizations, public and private businesses, and special interest agencies to involve them in a campaign to educate, inform, and train the community on evidence-based wellness programs and healthy living practices for older adults. Given that falls are the leading cause of death among Wisconsinites, 65 years plus, a special emphasis will be on evidence-based senior fall prevention training.
- Enhance current partnerships with American Red Cross, Wisconsin and Milwaukee County Emergency Management, local Fire and Police Departments, Department of Health Services Division of Quality Assurance and other local aging service organizations to engage them in conducting more community based presentations to assist with educating and preparing older adults and professionals from residential housing and assisted living and skilled nursing facilities on/for disasters.
- Continue to promote and highlight the significance of celebrating senior residents' contributions to Milwaukee County communities through the Senior Hall of Fame, Senior Statesman, Nutrition Volunteer Recognition, and Golden Idol to gain the continuous support of the existing and new community partners.
- MCDA will continue to adopt practices related to creating efficiencies around using paperless systems of communication.

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- In partnership with the Department of Health and Human Services, MCDA will continue to advocate for the design and establishment of a user-friendly outside entrance with appropriate and clear building signage where older adults will have easy, safe and adequate accessibility to the MCDA Aging Resource Center, Commission on Aging meetings and committee meetings.
- To ensure success of the Active Aging Research Center Technology Grant Project, MCDA will work with the University of Wisconsin – School of Engineering – Active Aging Research Center, Wisconsin Institute on Healthy Aging, Wisconsin Bureau of Aging and Disability Resources and the Waukesha and Richland Counties Aging and Disability Resource Centers to involve and garner the input of Milwaukee County older adults and organizations serving the aging population.
- Partner with Aurora Health System and other local partners to capitalize on existing infrastructure that will help mobilize efforts to bridge the gaps between medical and long-term services and supports to create a seamless system of care transitions.
- Utilize the 2012 Milwaukee County Department on Aging demographic report to identify, develop, and implement services and programs that support the needs of seniors.
- Coordinate opportunities for follow up discussions with the local seniors and aging network to ensure goals and strategies are appropriately implemented as written in the final 2013-2015 Area Plan.

DEPARTMENTAL PROGRAM DESCRIPTION

Milwaukee County Department on Aging, created in 1991, serves as Milwaukee County's designated Area Agency on Aging under the Older Americans Act and is the County's designated unit to administer aging programs. The Department plans for and services the growing needs of Milwaukee County's large and diverse older adult population.

The Department integrates multiple Federal and State revenue streams including the Older Americans Act, the Senior Community Services Program, Specialized Transportation Assistance Program for Counties (S85.21), Elder Abuse, Adult Protective Services, Base Community Aids (BCA), Family Care Resource Center Allocation, 100 percent Time Reporting, and available private matching grants and contributions.

The Commission on Aging is the County citizen agency, which consists of sixteen members representative of all segments of the Milwaukee County older adult population as appointed by the County Executive with approval of the County Board. The Commission functions as the lead organization responsible for the following: assessing major aging issues and needs concerning the population age 60 and older; reviewing the planning and service efforts of organizations and institutions in the county and its aging network; monitor State, Federal and local laws and regulations relating to the care and treatment of older adults; advocate for passage of legislation that meet the needs of older adults and make recommendations on issues relating to their well-being and functioning in order to enhance their ability to remain contributing members of the community. The Commission on Aging functions through three standing committees: Advocacy, Resource Center Oversight, and Service Delivery. The Commission and its standing committees are responsible for administering a comprehensive, coordinated human service system for community based services for County residents age 60 and older. This responsibility is supported by the Advisory Council, which establishes a permanent Intergenerational and Wellness Council. The Advisory Council is composed of 30 persons and the Intergenerational Council and Wellness Council include members who represent the diversity of Milwaukee County. MCDA serves as the administrative arm of the Commission on Aging.

The Department is the designated Aging Resource Center (ARC) for the older adult population in Milwaukee County under the State of Wisconsin's Family Care initiative.

The Milwaukee County Aging and Disability Resource Center (ADRC) Governing Board was created as the lead County agency required to perform specific functions related to the policies, operations and oversight of both the Aging Resource Center and the Disability Resource Center under Wisconsin State Statutes Chapter 46, serving persons age 60 or older and adults ages 18 to 59 with physical or developmental disabilities in need of long-term

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care. The ADRC Governing Board consists of seventeen (17) members representative of persons with physical and developmental disabilities and of the elderly as appointed by the County Executive with approval of the County Board.

The Department on Aging consists of three service areas:

Administration includes the Director's Office and the Fiscal and Support Services Division. The Director has overall responsibility for department operations, budget, community relations, new initiative development, community collaboration and acts as the liaison with elected officials at the local, state and federal government levels.

The major functions of the Fiscal and Support Services Division include budget development and management, accounting and personnel administration. The Division monitors departmental expenditures and revenues; reviews audits; reports service utilization and expenditures to County and State agencies; projects revenues and expenditures; and monitors compliance with funding source requirements. This Division also develops the Department's fiscal policies and assesses operations for effectiveness and efficiency.

Area Agency Services contracts for and monitors a comprehensive network of support services through community based agencies that assist older adults to remain independent in their homes. These programs are funded through the Older Americans Act and State revenue earmarked for elderly services. County tax levy funding is provided for program operation and maintenance of five county-owned senior center buildings. The Division is responsible for planning, research, and program development. In addition, unit staff solicits, monitors, evaluates and administers contracts for a variety of services in the community. Staff assists with contract development and coordinates the Request for Proposal process with other County departments.

The Area Agency Services Division provides staff support to the Milwaukee County Commission on Aging, its standing and ad hoc committees and the Advisory Council. Division staff assists the Commission in conducting public hearings and needs assessments as required under Federal statute, provides technical assistance and serves as a resource for businesses, universities and volunteer organizations interested in meeting the needs of older adults in the community.

The Senior Meal Program, part of the Area Agency Services Division, is funded under Titles III-C-1 and III-C-2 of the Older Americans Act, as well as other State and Federal funds received from the State of Wisconsin Bureau on Aging and Long Term Care Resources. The program also receives reimbursement for eligible elderly meals from the United States Department of Agriculture (USDA).

The Aging Resource Center acts as the point of entry for Family Care and all other long-term care programs and is responsible for arranging short-term assistance for older adults with immediate or pressing needs. It is the primary source of quality information and assistive services on issues affecting persons 60 years of age and older and their family support networks.

As a major component of the State of Wisconsin Family Care initiative, this Division has six primary functions:

- To provide Milwaukee County's older adults, their caregivers and the general public one central number to call for information about programs and services 24 hours a day;
- To provide pre-admission counseling to elders seeking residential placements;
- To determine eligibility for publicly funded and other long term care programs;
- To provide community education to older adults, their families, and caregivers on a broad range of subjects, including wellness and prevention of functional decline;

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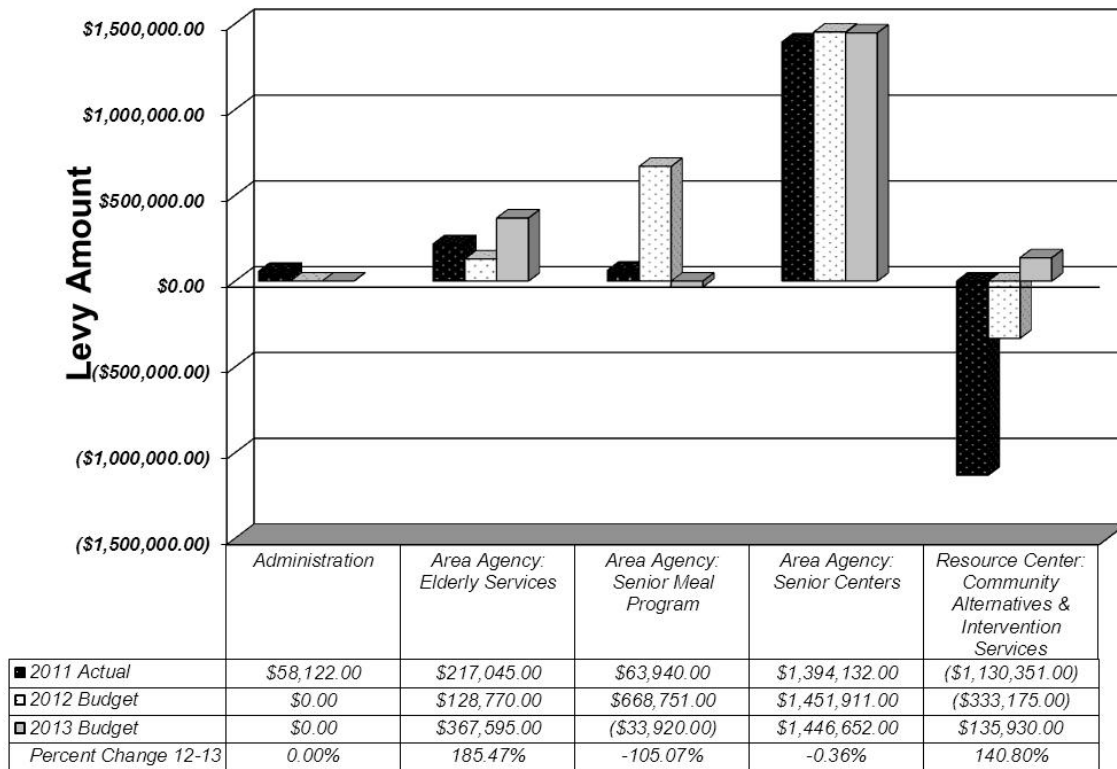
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- Options counseling for any resident age 60 and older; and
- Investigating allegations of elder abuse and providing protective services, guardianships and protective placement services to vulnerable older adults

Another integral function of the Resource Center is to coordinate daily with the State Income Maintenance staff (formerly Economic Support Division - Milwaukee County Department of Health and Human Services) to assure Medicaid eligibility compliance for persons choosing a publicly funded long term care option, including Family Care, Partnership, PACE and IRIS.

Organizational Levy Summary



2013 BUDGET

Approach and Priorities

- Allocate State funding streams to maximize utilization within funding regulations.
- Continue to sustain direct service level demands including congregate and home delivered meals, senior center operations and mandated services such as guardianships.
- Continue streamlining administrative processes as possible while maintaining program support integrity.
- Continue collaborating with other government agencies and community partners to provide services that are both excellent and efficient.
- Continue to support and promote programs and services that improve and protect the health and well-being of older adults, which encourage positive and healthful lifestyles.

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- Continue to support wellness and prevention through collaboration with community organizations to identify preventive and remedial actions to eliminate, correct and mitigate disease and health hazards.
- Protect and improve the lives, assure the safety, welfare and quality of care for victims and potential victims of abuse and neglect.
- Continue to promote actions that improve and protect the health and well-being of older adults through nutrition assistance programs and services.
- Maintain existing congregate and home delivered meal programs and senior center operations.

Programmatic Impacts

- Maintain family supports and respite services.
- Elder Abuse continues to be challenged in keeping up with demand for full investigation of accusations of abuse and neglect of elders in the community.
- Continue to exam and assessment service systems for capacity and gaps; develop program initiatives consistent with needs and gaps.
- Promote the health, safety and well-being of older adults while emphasizing prevention.

Budget Highlights

Staffing Adjustment

(\$109,902)

The 2013 Requested Budget abolishes two currently vacant positions, including 1.0 FTE Human Service Worker (Bilingual Russian) for a savings of \$56,822 and 1.0 FTE Service Support Specialist for a savings of \$53,080, resulting in a total salary and active fringe benefit reduction of \$109,902.

Contractual Short-term Staffing

(\$118,166)

Temporary staff funding support related to a greater than usual experience of retirements for 2012 is eliminated, resulting in an expenditure reduction of \$70,000 as MCDA Resource Center is able to fill critical vacancies. A further reduction of \$48,166 is reflected due to a projected increase in 100% time reporting revenue as the Resource Center continues staff development and training efforts regarding accurate and timely staff reporting for eligible reimbursable Medicaid and Medicare services.

Elder Abuse, Legal and Protective Services

\$92,768

Elder Abuse funding for client services and coordination of services for persons ages 60 and older continue to increase as it is intended to meet short term needs in order to stabilize a person's situation and address immediate concerns. Based on experience, related temporary short-term service expenditures for legal services, residential care, respite and adult daycare reflect an increase of \$42,000, from \$28,000 in 2012 to \$70,000 in 2013.

Related legal services in Corporation Counsel crosscharges reflect an increase of \$50,768 for elder abuse and protective service concerns, reflecting an overall net increase of \$92,768.

Shared Services

\$0

MCDA will continue to work with the Department of Health and Human Services (DHHS) to create efficiencies by sharing administrative services.

Senior Center Fitness Programs

\$0

Management of fitness programs at six senior centers, including five County-owned centers continues at the same level of service cost of \$64,000 and is transferred from purchase of service contracts to professional service contracts in 2013.

Evidence Based Prevention Program Management

\$92,263

The American Recovery and Reinvestment Act (ARRA) - Communities Putting Prevention to Work grant which provided access to Healthy Living Programs ended in 2012 for a revenue reduction of \$17,263. The Department on Aging continues to focus on management and coordination of evidence based prevention programs for

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Milwaukee County including Living Well, Stepping On and Walk with Ease, reflecting an expenditure increase of \$75,000 in consultant fees.

MIDAS \$50,000

The Department continues to share a data system managed by Department of Family Care, which houses shared client information input. An expenditure of \$50,000 continues in the Resource Center to continue system enhancements, upgrades and report development.

Older Americans Act Revenue \$204,447

The 2012 State/County contract decreased Older Americans Act federal grant funding by \$208,450 for Department on Aging. The decrease is projected to continue in 2013 for aging programs and services, reductions including \$17,890 in NSIP, \$61,684 in Title III-B, \$41,207 in Title III-C1, \$59,050 in Title III-C2, \$1,133 in Title III-D, \$22,612 in Title III-E and \$4,874 in Area Agency on Aging Administration funds.

State grant transportation funding is increased \$11,711, from \$650,037 to \$661,748, partially offset by a reduction of \$7,708 in State Pharmaceutical Assistance Program – Federal and State Aging Programs revenue, from \$55,619 to \$47,911.

Nutrition Meal Reimbursement (\$215,284)

In the 2012 Adopted Budget, the Department of Family Care opted out of meal purchases from Department on Aging Senior Meal Program. One community organization dissolved its meals on wheels aspect of its business in 2012, resulting in an increase of home delivered meals for the MCDA Senior Meal Program.

In 2013, Department of Family Care continues purchasing meals through the Department on Aging Senior Meal Program for the full cost of meals for its member participants. As a result, reimbursement revenue is increased \$545,961 primarily in home delivered meals, partially offset by an increase in catering costs of \$330,677 for a net reduction of \$215,284.

Senior Meal Program			
	2012 Budget	2013 Budget	Change
Number of Meal Sites Open	29	29	0
Meals Served at Meal Sites	326,771	294,363	(32,408)
Home Delivered Meals	213,430	260,557	47,127
Total Meals Served	540,201	554,920	14,719

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BUDGET SUMMARY				
Account Summary	2011 Actual	2012 Budget	2013 Budget	2012/2013 Change
Personal Services (w/o EFB)	\$ 4,055,853	\$ 4,292,381	\$ 4,135,615	\$ (156,766)
Employee Fringe Benefits (EFB)	3,212,811	3,210,787	3,371,947	161,160
Services	427,219	374,342	441,597	67,255
Commodities	1,081,103	1,183,939	1,168,944	(14,995)
Other Charges	6,506,322	6,797,144	6,757,436	(39,708)
Debt & Depreciation	0	0	0	0
Capital Outlay	40,471	100,000	100,000	0
Capital Contra	0	0	0	0
County Service Charges	4,092,164	3,654,289	3,782,074	127,785
Abatements	(1,484,478)	(1,340,366)	(1,112,677)	227,689
Total Expenditures	\$ 17,931,465	\$ 18,272,516	\$ 18,644,936	\$ 372,420
Direct Revenue	1,030,184	496,852	1,042,813	545,961
State & Federal Revenue	16,330,647	15,859,406	15,685,866	(173,540)
Indirect Revenue	0	0	0	0
Total Revenue	\$ 17,360,831	\$ 16,356,258	\$ 16,728,679	\$ 372,421
Direct Total Tax Levy	570,634	1,916,258	1,916,257	(1)

PERSONNEL SUMMARY				
	2011 Actual	2012 Budget	2013 Budget	2012/2013 Change
Position Equivalent (Funded)	77.0	77.2	73.8	(3.4)
% of Gross Wages Funded	99.5	98.1	98.0	(0.1)
Overtime (Dollars)	\$ 70,208	\$ 37,488	\$ 37,488	\$ 0
Overtime (Equivalent to Position)	0.0	0.7	0.7	0.0

PERSONNEL CHANGES						
Job Title/Classification	Title Code	Action	# of Positions	Total FTE	Division	Cost of Positions (Salary Only)
Human Srv Worker (Bi-ling Russ)	55990	Abolish	(1)	(1.00)	Resource Center	\$ (33,884)
Service Support Specialist	55440	Abolish	(1)	(1.00)	Resource Center	(30,856)
TOTAL						\$ (64,740)

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ORGANIZATIONAL COST SUMMARY					
DIVISION		2011 Actual	2012 Budget	2013 Budget	2012/2013 Change
Administration	Expenditure	\$ 58,122	\$ 0	\$ 0	\$ 0
	Revenue	0	0	0	0
	Tax Levy	\$ 58,122	\$ 0	\$ 0	\$ 0
Area Agency: Elderly Services	Expenditure	\$ 3,469,675	\$ 3,411,214	\$ 4,101,872	\$ 690,658
	Revenue	3,252,630	3,282,444	3,734,277	451,834
	Tax Levy	\$ 217,045	\$ 128,770	\$ 367,595	\$ 238,824
Area Agency: Senior Meal Program	Expenditure	\$ 4,740,851	\$ 4,759,678	\$ 4,484,821	\$ (274,857)
	Revenue	4,676,911	4,090,927	4,518,741	427,814
	Tax Levy	\$ 63,940	\$ 668,751	\$ (33,920)	\$ (702,671)
Area Agency: Senior Centers	Expenditure	\$ 1,394,132	\$ 1,451,911	\$ 1,446,652	\$ (5,259)
	Revenue	0	0	0	0
	Tax Levy	\$ 1,394,132	\$ 1,451,911	\$ 1,446,652	\$ (5,259)
Resource Center: Community Alternatives & Intervention Services	Expenditure	\$ 8,212,035	\$ 8,632,450	\$ 8,611,591	\$ (20,859)
	Revenue	9,342,386	8,965,625	8,475,661	(489,964)
	Tax Levy	\$ (1,130,351)	\$ (333,175)	\$ 135,930	\$ 469,105

All departments are required to operate within their expenditure appropriations and their overall budgets. Pursuant to Section 59.60(12), Wisconsin Statutes, "No payment may be authorized or made and no obligation incurred against the county unless the county has sufficient appropriations for payment. No payment may be made or obligation incurred against an appropriation unless the director first certifies that a sufficient unencumbered balance is or will be available in the appropriation to make the payment or to meet the obligation when it becomes due and payable. An obligation incurred and an authorization of payment in violation of this subsection is void. A county officer who knowingly violates this subsection is jointly and severally liable to the county for the full amount paid. A county employee who knowingly violates this subsection may be removed for cause."