

COUNTY EXECUTIVE'S 2009 BUDGET

DEPT: DEPARTMENT ON AGING

UNIT NO. 7900
FUND: General - 0001

OPERATING AUTHORITY & PURPOSE

Under the Older Americans Act, the Milwaukee County Department on Aging is a Federal/State designated Area Agency on Aging for Milwaukee County. The Department on Aging's responsibilities are outlined in Chapter 53 of the General Ordinances of Milwaukee County and include planning, developing, providing, purchasing and coordinating services for the County's older adult population. The Department reports directly to the County Executive and provides staff support to the Milwaukee County Commission on Aging.

This Department provides a single entry point for older adults and their caregivers who are in need of elderly service information and assistance throughout Milwaukee County. Services provided by the Department on Aging are designed to provide an appropriate mix of community-based care and direct services to prevent the inappropriate and costly institutionalization of older adults. The Department is the designated Resource Center and Care Management Organization for older people in Milwaukee County under the State of Wisconsin's Family Care initiative.

BUDGET SUMMARY				
Account Summary	2007 Actual	2008 Budget	2009 Budget	2008/2009 Change
Personal Services (w/o EFB)	\$ 4,487,368	\$ 4,843,480	\$ 4,713,713	\$ (129,767)
Employee Fringe Benefits (EFB)	2,971,823	3,216,807	3,299,665	82,858
Services	838,639	834,479	930,141	95,662
Commodities	1,140,726	1,214,483	1,198,823	(15,660)
Other Charges	6,854,145	6,683,912	6,512,884	(171,028)
Debt & Depreciation	0	0	0	0
Capital Outlay	290,296	304,325	150,000	(154,325)
Capital Contra	0	0	0	0
County Service Charges	4,445,877	4,958,762	4,830,943	(127,819)
Abatements	(2,380,616)	(2,310,581)	(2,371,809)	(61,228)
Total Expenditures	\$ 18,648,258	\$ 19,745,667	\$ 19,264,360	\$ (481,307)
Direct Revenue	1,251,575	1,206,775	1,255,075	48,300
State & Federal Revenue	15,004,798	14,893,068	14,992,093	99,025
Indirect Revenue	0	0	0	0
Total Revenue	\$ 16,256,373	\$ 16,099,843	\$ 16,247,168	\$ 147,325
Direct Total Tax Levy	2,391,885	3,645,824	3,017,192	(628,632)

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ADDITIONAL COSTS NOT INCLUDED IN TAX LEVY*				
Account Summary	2007 Actual	2008 Budget	2009 Budget	2008/2009 Change
Courthouse Space Rental	\$ 0	\$ 0	\$ 0	\$ 0
Tech Support & Infrastructure	358,660	0	0	0
Distribution Services	11,112	0	0	0
Telecommunications	36,701	0	0	0
Record Center	5,451	0	0	0
Radio	0	0	0	0
Computer Charges	708	0	0	0
Applications Charges	230,576	0	0	0
Apps Charges - Network	0	0	0	0
Apps Charges - Mainframe	0	0	0	0
HRIS Allocation	27,087	0	0	0
Total Charges	\$ 670,295	\$ 0	\$ 0	\$ 0
Direct Property Tax Levy	\$ 2,391,885	\$ 3,645,824	\$ 3,017,192	\$ (628,632)
Total Property Tax Levy	\$ 3,062,180	\$ 3,645,824	\$ 3,017,192	\$ (628,632)

* In 2007, these costs were included in other charging departmental and non-departmental budgets. They were reflected here to show the "total" amount of tax levy support for this Department. In 2008 and 2009, these costs are budgeted within the receiving department to show the tax levy cost in the department.

PERSONNEL SUMMARY				
	2007 Actual	2008 Budget	2009 Budget	2008/2009 Change
Personal Services (w/o EFB)	\$ 4,487,368	\$ 4,843,480	\$ 4,713,713	\$ (129,767)
Employee Fringe Benefits (EFB)	\$ 2,971,823	\$ 3,216,807	\$ 3,299,665	\$ 82,858
Position Equivalent (Funded)*	88.3	89.4	83.3	(6.1)
% of Gross Wages Funded***	95.6	97.0	97.0	(3.0)
Overtime (Dollars)**	\$ 47,144	\$ 43,738	\$ 42,975	\$ (763)
Overtime (Equivalent to Position)	0.9	0.7	0.8	0.1

* For 2007 Actuals, the Position Equivalent is the budgeted amount.

** Delineated for information. (Also included in personal services.)

PERSONNEL CHANGES				
Job Title/Classification	Action	Number of Positions/ Total FTE	Division	Cost of Positions (Excluding Social Security & Fringe)
I & A Outreach Coordinator	Abolish	1/1.0	Resource Center	\$ (53,525)
				\$ (53,525)

* These positions are transferred to the CMO to address a new initiative and to properly reflect Accounting Manager in function area.

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ORGANIZATIONAL COST SUMMARY					
DIVISION		2007 Actual	2008 Budget	2009 Budget	2008/2009 Change
Administration	Expenditure	\$ 1,949,502	\$ 2,310,581	\$ 2,160,251	\$ (150,330)
	Abatement	(1,943,823)	(2,310,581)	(2,163,196)	147,385
	Revenue	162,330	0	0	0
	Tax Levy	(156,651)	0	(2,945)	(2,945)
Area Agency: Elderly Services	Expenditure	\$ 3,543,956	\$ 3,400,962	\$ 3,465,792	\$ 64,830
	Abatement	(34,881)	0	(59,029)	(59,029)
	Revenue	3,251,058	2,964,689	3,189,380	224,691
	Tax Levy	\$ 258,017	\$ 436,273	\$ 217,383	\$ (218,890)
Area Agency: Senior Meal Program	Expenditure	\$ 4,405,071	\$ 4,729,781	\$ 4,777,502	\$ 47,721
	Abatement	(11,296)	0	(15,000)	(15,000)
	Revenue	4,518,482	4,766,262	4,766,262	0
	Tax Levy	\$ (124,707)	\$ (36,481)	\$ (3,760)	\$ 32,721
Area Agency: Senior Centers	Expenditure	\$ 1,628,126	\$ 1,647,359	\$ 1,492,145	\$ (155,214)
	Abatement	0	0	0	0
	Revenue	0	0	0	0
	Tax Levy	\$ 1,628,126	\$ 1,647,359	\$ 1,492,145	\$ (155,214)
Resource Center: Community Alternatives & Intervention Services	Expenditure	\$ 9,334,928	\$ 9,799,597	\$ 9,542,563	\$ (257,034)
	Abatement	(390,626)	0	(134,584)	(134,584)
	Revenue	8,154,935	8,174,797	8,087,492	(87,305)
	Tax Levy	\$ 789,367	\$ 1,624,800	\$ 1,320,487	\$ (304,313)

MISSION

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

- MCDA Fiscal and IT staff will develop and implement a system in place of Scripts to pay for client services.

OBJECTIVES

- Recommendations of the Commission on Aging regarding a Nutrition Site Survey will be followed.
- A guide to volunteer opportunities for seniors in Milwaukee County using the Gatekeeper format will be disseminated.
- Training material developed by the Health Wisconsin Partnership with the Medical College of Wisconsin will be made available to medical professionals and providers.
- The public will be able to access an Aging Resource Center database on a web portal.

DEPARTMENT DESCRIPTION

The Milwaukee County Department on Aging was created in the 1991 budget to serve as Milwaukee County's designated Area Agency on Aging under the Older Americans Act and as 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. It is the one dedicated, specialized agency within Milwaukee County government to represent and serve the needs of the elderly.

The Department integrates several Federal and State revenue streams involving the Older Americans Act, the Senior Community Services Program, Specialized Transportation Assistance Program for Counties (S85.21), the Alzheimer's Family and Caregiver Support Program (AFCSP), Base Community Aids (BCA) and Family Care.

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The Department is the designated Aging Resource Center and Care Management Organization (CMO) for older people in Milwaukee County under the State of Wisconsin's Family Care initiative. Family Care is a coordinated managed care, long term care, Medicaid waiver system which provides entitlement to comprehensive and flexible home and community-based care to foster independence and quality of life for persons ages 60 and older. Family Care Expansion will provide additional services to those 18-59 and is discussed in Aging-CMO 7990.

The sixteen member Commission on Aging is the lead county agency responsible for assessing the major aging issues and needs concerning the sixty (60) and over, age population, and for reviewing the planning and service efforts of organizations and institutions in the county and its aging network, and for making recommendations thereof. The Commission on Aging functions through three standing committees – Advocacy, Resource Center Oversight, and Service Delivery. The Advisory Council to the Commission on Aging is made up of thirty (30) persons representing the diversity of Milwaukee County. The Commission on Aging has also created a permanent Intergenerational Council and a Wellness Council which includes members that represent the entire County of Milwaukee. Department on Aging serves as the administrative arm of the Commission on Aging.

The Department on Aging consists of four service areas:

Administration includes the Director's Office and the Fiscal and Support Services Division. 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 provides 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. The Division is responsible for planning, research, and program development. In addition, unit staff solicit, monitor, evaluate and administer contracts for a variety of services in the community. Staff assists with contract development and coordinates the request for proposals process with other County departments.

The Area Agency Services Division provides staff support to the Milwaukee County Commission on Aging, its standing committees and the Advisory Council. Division staff assists the Commission in conducting public hearings and needs assessments as required under Federal statute, provide technical assistance and serve as a resource for businesses, universities and voluntary 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 purpose of the Senior Meal Program is:

1. To provide older persons, particularly those with low incomes; low-cost, nutritionally sound meals in strategically located congregate sites. One of the 31 meal sites offers weekend meals to program participants. The program also seeks to reduce the social isolation of participants by providing supportive services including recreation, transportation, and education.
2. To provide home-delivered meals five to seven days a week to eligible frail, homebound, older adults. The program assists older adults in remaining independent and living within their own homes, and to provide limited gap-filling services in addition to meals.

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The **Resource Center** Division acts as a point of entry for the Department's Family Care 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 four primary functions: (1) 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; (2) to provide pre-admission counseling to elders seeking residential placements; (3) to determine eligibility for the Family Care benefit; and (4) to provide community education to older adults, their families, and caregivers on a broad range of subjects, including wellness and prevention of functional decline. Another integral function of the Resource Center is to coordinate daily with the Economic Support Division of the Department of Health and Human Services to assure Medicaid eligibility compliance for persons choosing the Family Care benefit. Other major Resource Center responsibilities include investigating allegations of elder abuse and providing protective services, guardianships and protective placement services to vulnerable older adults.

The **Care Management Organization (CMO)** Division operates the Family Care Program in Milwaukee County. This Division is detailed in a separate narrative in 2009.

BUDGET HIGHLIGHTS

- Personal Services expenditures without fringe benefits decrease by \$129,767, from \$4,843,480 to \$4,713,713. The decrease is primarily due to the abolishment of 1.0 FTE vacant I&A Outreach Coordinator (Aging), and 2008 transfers.
- The 2009 budget includes a tax levy reduction of \$628,632, from \$3,645,824 in 2008 to \$3,017,192 in 2009. Revenue increased by \$147,325, from \$16,099,843 to \$16,247,168. Expenditures decrease by \$481,307, from \$19,745,667 to \$19,264,360, primarily due to decreases in the purchase of service contracts, capital outlay and crosscharges.
- Contractual Services increased by \$93,171. This increase primarily includes \$32,325 for data access services and licensing for a nutrition scanner system, \$20,713 for phone services, \$25,630 for building space rental and \$10,083 in auto allowance reimbursements.
- Space rental expenditures increase by \$25,630 from \$400,213 to \$425,843 due to a negotiated five-year lease, with an expiration of December 31, 2010. The lease terms afford the right to extend the term of the lease for one (or one (1) period of five (5) years ("the Second Option") based on specified conditions outlined in the contract agreement. Written notification to extend the current Lease is required no later than 180 days prior to commencement of applicable Renewal Terms.
- Departmental grant funding includes \$35,050 for the second year of a three-year project from the Healthier Wisconsin Partnership at the Medical College of Wisconsin. The grant funds a community partnership with the Resource Center for implementation of an innovative, educational tool to promote timely recognition, response and referral of suspected cases of elder abuse and neglect. The program is a model that can be adopted and replicated by other providers, counties, communities and institutions. The project will also develop and test tools to help clinicians reliably detect elders who are at high risk or are victims of maltreatment and clearly identify the Department on Aging as the lead investigative agency for Milwaukee County.
- Department on Aging continues as the lead agency in community collaboration efforts in Connecting Caring Communities partnership through funding of a two year grant for the project *Connecting Caring Communities – Neighborhood Technical Assistance Extension*. Expenditures and revenues increase \$75,000 for

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the second year of a two-year grant beginning in 2008 with funding provided by Faye McBeath, Helen Bader and Greater Milwaukee foundations. *Connecting Caring Communities – Neighborhood Technical Assistance Extension* continues strengthening of the system of long term care resulting from implementation of multiple program innovations developed, nurtured and supported through partnerships provided under the Connecting Caring Communities project, initially funded through the Robert Wood Johnson Foundation Community Partnerships for Older Adults, including local community match from the Helen Bader, Faye McBeath and Greater Milwaukee foundations.

- The Aging and Disability Resource Center prevention project which began in 2008 continues in 2009 with grant funding of \$93,984. Project grant funds provided for Milwaukee Chronic Disease Self-Management Programs (CDSMP) and other community based risk reduction programs are to be coordinated into a sustainable local network. The network will support increased CDSMP participation, facilitate participants' access to post program interventions/support and support training of additional lay leaders.

ADMINISTRATION

- Expenditures decrease by \$150,330 from \$2,310,581 to \$2,160,251. An increase of abatements of \$147,385, from \$2,310,581 to \$2,163,196 equates to a decrease in tax levy of \$2,945.

AREA AGENCY SERVICES

The Area Agency Services Division consists of three major program areas: Elderly Services, the Senior Meal Program and the Senior Centers.

Elderly Services

- Expenditures increase by \$64,380 from \$3,400,962 to \$3,465,792 with a decrease in abatements of \$59,029. Revenues increased \$224,691 from \$2,964,689 to \$3,189,380.
- Funding for purchase of services decreases by \$59,029 to reflect changes in individualized

transportation and senior programming, as well as meal site repositioning and collaboration.

Senior Meal Program

	2008	2009	2008/2009
	<u>Budget</u>	<u>Budget</u>	<u>Change</u>
Number of Meal Sites Open	31	31	0
Meals Served at Meal Sites	348,522	322,219	(26,303)
Home-Delivered Meals	272,945	249,207	(23,738)
Total Meals Served	621,467	571,426	(50,041)

- Expenditures increased by \$47,721 from \$4,729,281 to \$4,777,502. Abatements decreased by \$15,000 resulting in a tax levy decrease of \$3,760.
- Meal sites remain at 31 in 2009, unchanged since 2006.
- Home-delivered and congregate meals continue to project a decline in 2009 based on 2007 and 2008 projected experience. Congregate meal site utilization reflect decreases by individual meal site location. Meal site utilization reflects a decline partially due to housing patterns established in many years past. As certain sites are experiencing decreases, other meal sites are experiencing growth in utilization due to client relocations. Enhanced facilities and opening of new meal sites in locations providing ease of access and other programs and services are meal sites reflecting an increase in utilization.
- A Nutrition Study is underway in conjunction with the Milwaukee County Senior Meal Program Nutrition Council. The goal in accordance with the Milwaukee County Area Plan for Older People is to evaluate the program, determine appropriateness of current locations and reconfigure sites.
- The Senior Meal Program Director (a Registered Dietician) will provide consulting services to the CMO through a continuous quality improvement plan to address the nutritional needs of Home Delivered Meal clients, assure program

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compliance, and maintain fair and consistent pricing.

- The nutrition program utilizes the Wisconsin Department of Health and Family Services data system known as SAMS to track client nutrition data. Department on Aging implemented a SAMS compatible data scanner system called SAMScan Swipe in 2008. SAMScan is a tool used in conjunction with scanning client identifiers and service units from different bar-coded rosters. SAMScan downloads service records from a scanning device and allows the scanned records to be reviewed and edited before uploading the data to SAMS. Expenditures increase \$32,325 for licenses permitting unlimited access to SAMScan Swipe Web Application, on-call technical support, routine upgrades and an annual SAMS integration fee.
- The Senior Meal Program consists of the Commodity Supplemental Food Program (administered by the Hunger Task Force) and the Reach Program (administered by Second Harvest). These programs will continue at no additional cost to seniors. The programs also enable participants at various meal sites to receive food boxes each month. University of Wisconsin Extension classes will continue at 17 meal sites.

Senior Centers

- Expenditures decreased by \$155,214 from \$1,647,359 to \$1,492,145 resulting in a decrease in tax levy of \$155,214.
- In 2009, major maintenance reflects a decrease of \$150,000 from \$300,000 for continued maintenance needs of the County-owned Senior Centers. Projects will be funded based on long-range capital and operating plans as established in 2006 and updated on an annual basis.
- Purchase of Service contracts for the operations of the Senior Centers in the amount of \$1,258,867 remain at the 2008 budget appropriation level.
- The Department on Aging continues to seek grant funding and partnerships to sustain and

expand fitness and physical activity programming at the Senior Centers.

RESOURCE CENTER: COMMUNITY ALTERNATIVES & INTERVENTION SERVICES DIVISIONS

- The Resource Center reflects an overall tax levy reduction of \$304,313 due to a decrease in expenditures by \$257,034, an abatement decrease of \$134,584, and a decrease of \$87,305 in revenue. Personal services also reflect a reduction of \$203,539 in vacancy and turnover, at approximately the same level as 2008 adopted.
- Department on Aging continues to unfund the following positions in 2009: 2.0 FTE Human Service Workers, and 1.0 FTE Program Coordinator (Resource Center) created in 2008. The Department retains authority to fill these positions should additional revenue for outreach, expansion, and an aging populations growing demand for long-term care be identified in 2009.
- Revenues decrease \$87,305 due primarily to the transfer of \$99,098 in the Family Caregiver and Support Program (Title III E) and \$167,942 in Alzheimers Family Caregiver Support Program funded services from the Resource Center to Area Agency Division. Client services funded with Family Caregiver and Support Program and Alzheimers Family Caregiver Support Program revenue will be provided through contractual agreement in 2009 in the Area Agency Division. Revenue decreases are partially offset by an increase of \$119,807 in 100% time reporting for Resource Center I&A revenues and \$61,322 in Income Maintenance revenue for Medicaid reimbursable services.
- Elder Abuse Awareness grant funding continues in 2009 at \$35,050, reflecting a reduction of \$26,700 from the 2008 funding level of \$61,750. The grant is funded through an endowment at the Medical College of Wisconsin as a result of Blue Cross Blue Shield. The grant funds a community partnership with the Resource Center to improve the health and safety of at-risk elders by increasing awareness, response and referral of elder abuse and neglect. The project will develop and test tools to help clinicians reliably detect elders who are at high

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risk or are victims of maltreatment and clearly identify the Department on Aging as the lead investigative agency for Milwaukee County. The effective period of performance for this partnership project extends from July 2007 through June 30, 2010.

CARE MANAGEMENT COORDINATED SERVICES DIVISION (CARE MANAGEMENT ORGANIZATION)

- The CMO budget presented in a separate narrative continues to recognize the CMO's continued growth and distinctive programming and remains under the authority of the Department on Aging in 2009. The CMO budget details Family Care Expansion and the associated changes therein.
- Expenditures of \$382,888 are budgeted for capital improvements in 2009 for capital improvements related to the Washington Park Senior Center. This appropriation includes replacing the fire alarm system, and infrastructure improvements. For further detail, refer to the 2009 Capital Improvements Budget.
- As a result of the 2009 reorganization of the Fleet Management Division, vehicle-owning and leasing departments no longer pay for vehicles and equipment through rental rates (crosscharged from Fleet), but are allocated a maintenance appropriation to pay for vehicle maintenance and repairs provided by the County's maintenance provider. Departments are now responsible for vehicle repair and replacement decisions in consultation with the Fleet Division. This restructuring results in a decrease in crosscharges from Fleet Management of \$11,035. The Division is allocated \$4,414 for maintenance and repairs of its vehicles and equipment for 2009. The 2009 maintenance appropriation is less than the 2008 crosscharge amount as overhead is no longer allocated to departments but budgeted centrally as part of the contract costs.
- 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 severely liable to the county for the full amount paid. A county employee who knowingly violates this subsection may be removed for cause."