

B U D G E T S U M M A R Y

Category	2015 Actual	2016 Actual	2017 Budget	2018 Budget	2018/2017 Variance
Expenditures					
Personnel Costs	\$7,431,032	\$7,267,963	\$7,730,837	\$8,598,888	\$868,051
Operation Costs	\$9,916,633	\$9,839,540	\$9,891,441	\$9,065,965	(\$825,476)
Debt & Depreciation	\$0	\$0	\$0	\$0	\$0
Capital Outlay	\$90,536	\$116,627	\$100,000	\$100,000	\$0
Interdept. Charges	\$1,161,231	\$971,039	\$1,096,550	\$1,045,524	(\$51,026)
Total Expenditures	\$18,599,432	\$18,195,169	\$18,818,828	\$18,810,377	(\$8,451)
<i>Legacy Healthcare/Pension</i>	<i>\$1,801,369</i>	<i>\$2,114,049</i>	<i>\$2,105,000</i>	<i>\$2,946,403</i>	<i>\$841,403</i>
Revenues					
Direct Revenue	\$1,255,568	\$1,104,214	\$924,000	\$909,000	(\$15,000)
Intergov Revenue	\$16,164,564	\$16,129,369	\$16,281,833	\$16,050,349	(\$231,484)
Indirect Revenue	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$17,420,132	\$17,233,583	\$17,205,833	\$16,959,349	(\$246,484)
Tax Levy	\$1,179,300	\$961,587	\$1,612,995	\$1,851,028	\$238,033
Effective Tax Levy*	(\$3,158,575)	(\$3,300,633)	(\$3,061,692)	(\$3,737,436)	(\$675,744)
Personnel					
Full-Time Pos. (FTE)**	75.71	77.15	76.37	73.34	(3.03)
Seas/Hourly/Pool Pos.	0	0	0	0	0
Overtime \$	\$11,158	\$32,977	\$0	\$0	\$0

* This Effective Tax Levy excludes interdepartmental charges and fringe benefit costs.

** The 2018 Budget FTEs include Vacancy & Turnover (VANDT) & Overtime (OT). The 2017 Budget, 2016 Actual, and 2015 Actual FTEs are restated to reflect this change. Program Area tables include these changes as well.

Department Mission: The Milwaukee County Department on Aging (MCDA) is committed to its mission of affirming the dignity and value of older adults in the County by supporting their choices for living in and giving to our community. MCDA strives to provide a holistic array of services specifically targeted to support the needs of seniors to live the most independent and fulfilled lives. To maximize its service reach and to cost efficiently deliver services, MCDA actively collaborates with nonprofits, governments, and private entities.

Department Description: The Department on Aging (MCDA) is broadly divided in three divisions: Area Agency on Aging (AAA), Aging Resource Center (ARC), and Administration, which together manage five functional areas. The Area Agency on Aging (AAA) manages community health and outreach programs such as senior wellness and policy and program planning. AAA also manages two other major functional areas – senior meal program and senior centers. The Aging Resource Center (ARC) manages information and assistance, elder abuse, long term service support, Dementia care, guardianship, and access eligibility and support services. The Administration provides oversight over a wide range of aging programs and services for the County's large and diverse senior population.

In order to address a structural budgetary deficit caused primarily by growing pension and retiree health care costs, as well as reductions in support from the State, the 2018 Budget includes a vacancy and turnover increase of approximately one percent for most County departments for an overall savings of \$1,877,496. The increased

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FUND: **General — 0001**

vacancy and turnover for the Department on Aging is \$64,488. In order to ensure that vacancy and turnover savings are realized, all requests to fill positions shall be reviewed and approved by the Department of Administrative Services before the position may be filled.

Major Changes in FY 2018: The Milwaukee County Department of Aging continues to balance increasing service needs for an expanding senior population with continually diminishing revenues. This poses a challenge to maintain service levels to meet the needs of a growing population. MCDA's focus in 2018 is to extend support services with the greatest impact and to expand reach in the County's older population.

MCDA utilizes the following aggressive service alignments using data driven and cost benefit analysis:

- The Department has four vacant positions. MCDA eliminates these long-term vacancies while realigning workloads within existing staff.
- The Department explores efficiencies in contracts by encouraging competition among various service providers. New request for proposals are planned for various service contracts.

To serve a growing population of seniors in the County, the Department aims to extend its services through the following initiatives:

- The Department plans to form community and provider collaborations to inform an additional 100 homebound clients of its services by December 31, 2018.
- The Department provides Alzheimer support services. In 2018, the state revenue for Alzheimer's Family Caregiver Support Programs will grow by \$215,000. Older adults and family members who assist with Alzheimer's support will have increased opportunities for educational information and related topics that will allow seniors to remain independent in the community.

An expenditure reduction of \$105,554 is included in this department to avoid an increase of the countywide vehicle registration fee of \$30. This expenditure reduction shall be managed by the department to achieve a commensurate tax levy savings by seeking efficiencies to minimize the impact on the delivery of programs and services.

Prior to enacting any direct service cuts, departments will work with the Department of Administrative Services - Performance, Strategy, and Budget to identify opportunities to re-organize, streamline, consolidate, eliminate, or otherwise reduce duplication and the cost of administrative expenditures within County government. The initiative shall include a review of prior internal and external audits, consulting reports, workgroup activities, and studies. In addition, the effort should include a critical reassessment of any expenditure of contract funds for non-core services.

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FUND: **General — 0001**

Strategic Program Area 1: Administration

Service Provision: **Mandated**

Strategic Outcome: **High quality, responsive services**

What We Do: Activity				
Activity	2015 Actual	2016 Actual	2017 Target	2018 Target
Admin: Staff FTE ratio*	3:78	1:79	3:81	3:77

*In 2015 and 2016 the Director Administration Aging position was housed in lower org 7931.

How We Do It: Program Budget Summary					
Category	2015 Actual	2016 Actual	2017 Budget	2018 Budget	2018/2017 Variance
Expenditures	(\$31,429)	(\$9,065)	\$0	\$0	\$0
Revenues	\$0	\$100	\$0	\$0	\$0
Tax Levy	(\$31,429)	(\$9,165)	\$0	\$0	\$0
FTE Positions	5.77	5.70	6.50	5.50	(1.00)

How We Do It: Performance Measures				
Performance Measure	2015 Actual	2016 Actual	2017 Target	2018 Target
Revenue dollars/fiscal staff	\$17,420 / 132:4	\$17,233 / 583:3	\$17,205 / 833:4	\$16,959 / 349:4
Overtime costs/personal service cost	\$11,158 / \$7,431,032	\$32,977 / \$7,267,963	\$0 / \$7,730,837	\$0 / \$8,704,442

Strategic Overview: MCDA administration provides leadership, fiscal support, and community relations for the department. This program area is also the Department’s conduit for community collaboration on behalf of, and with, the older adults of Milwaukee County.

Strategic Implementation: In 2018, the Department seeks efficiencies in operations through a review of program and service offerings. MCDA will continue to utilize various County department services, including Facilities, IMSD, Procurement, and Corporation Counsel legal services. MCDA identifies and shares program resources with the Department of Health and Human Services, including coordination of Chapter 55 compliance, evidence-based prevention/coordination, and Aging Disability Resource Center Governing Board support.

The revenues from other aging program areas completely cover administrative service costs.

Strategic Program Area 2: Aging Resource Center

Service Provision: Mandated

Strategic Outcome: Quality of Life

What We Do: Activity				
Activity	2015 Actual	2016 Actual	2017 Target	2018 Target
Number of people contacted at outreach events	Data not available	13,232	13,000	13,500
Number of consumer calls	49,699	47,207	47,000	47,500
Options Counselling cases	5,162	5,137	5,000	5,000
Long Term Care applications	1,974	2,367	1,900	2,000
Long Term Care enrollments	1,975	1,940	1,900	2,000
Elder Abuse cases	873	942	1,000	1,100

How We Do It: Program Budget Summary					
Category	2015 Actual	2016 Actual	2017 Budget	2018 Budget	2018/2017 Variance
Expenditures	\$8,174,593	\$7,999,141	\$8,420,677	\$9,458,555	\$1,037,878
Revenues	\$8,577,542	\$8,454,718	\$8,630,031	\$8,327,361	(\$302,670)
Tax Levy	(\$402,949)	(\$455,577)	(\$209,354)	\$1,131,194	\$1,340,548
FTE Positions	60.24	61.78	60.87	61.18	0.31

How Well We Do It: Performance Measures				
Performance Measure	2015 Actual	2016 Actual	2017 Target	2018 Target
100% Time reporting Medicaid match	40.7%	39.6%	39.5%	39.5%
Average time in phone queue (minutes)*	2.78	3.76	5.00	5.00

*The increase in target average time in phone queue is mostly a reflection of the complexity of cases handled by existing staff.

Strategic Overview: The Aging Resource Center (ARC) provides outreach and support to persons 60 years and older, offering information and assistance on available programs and services. ARC provides options counseling for seniors and their families, functional eligibility determination for long term care programs, Medicaid application assistance, and enrollment into local publicly funded long-term care programs. The ARC’s Elder Abuse unit investigates allegations of physical abuse, financial exploitation, neglect and emotional abuse of adults age 60 and over. It also provides intervention services as the case warrants, including court-ordered corporate guardian services.

Strategic Implementation: The Aging Resource Center is partially supported through State grant funding and Medicaid reimbursement funds. In 2018, major revenue changes include: decreases of \$81,500 in Medicare Improvements for Patients and Providers Act (MIPPA) and \$416,000 in State and Federal reimbursements for ARC services. These decreases are mitigated by State revenue increases of \$15,000 in Domestic Abuse in Later Life funds, \$44,976 in Innovation Grant funds, and \$116,000 in Alzheimer’s Family Caregiver Support Programs.

To enhance support of individuals living with Alzheimer’s and Dementia, the Department will utilize the partnership memory café model to create a minimum of two additional locations in 2018. The memory café model is a partnership with area business, such as restaurants, to enhance support and promote exercise and socialization of individuals living with Alzheimer’s and Dementia. The Department also plans to partner with local libraries and other community-based

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agencies in 2018 to open four new Memory Connection Centers (or “hubs”) that are designed as a one-stop-shop for services and families to access information about Dementia resources.

In 2018, the Aging Resource Center continues to fund two Full Time Equivalent (FTE) Service Support Specialist positions to assist the Milwaukee County Transit’s (MCTS) Growing Opportunities Pass (GO PASS) program. This program provides subsidized travel on MCTS buses to seniors and disabled County residents. The Department has budgeted \$16,000 in administrative costs and \$109,000 in two full-time employees to support this program. This program is covered by tax levy.

In 2018, MCDA abolishes one vacant Service Support Specialist position and one vacant Human Service Worker position.

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What We Do: Activity Data				
Activity	2015 Actual	2016 Actual	2017 Target	2018 Target
Job readiness training group sessions*	12	136	160	160
Mature workers: number employed	76	79	80	80
Legal assistance: consultation hours	9,295	10,945	8,211	8,000
Legal assistance: seniors served**	1,262	1,154	1,200	1,100
Telephone reassurance calls: clients served per day	129	96	100	105
Alzheimer's Counseling and Community Support: number of people served	3,730	3,050	3,000	3,200
Evidence Based Prevention (EBP) program participants	444	556	594	635
Number of elderly trained in the EBP leadership initiative	19	37	21	23

*Job readiness group training started at year-end in 2015.

**Reduction in 2018 Legal Assistance budget is due to anticipated elimination of SHIP funding in the FY2018 Federal budget.

How We Do It: Program Budget Summary					
Category	2015 Actual	2016 Actual	2017 Budget	2018 Budget	2018/2017 Variance
Expenditures	\$4,081,201	\$3,924,607	\$3,937,863	\$3,877,519	(\$60,344)
Revenues	\$4,108,419	\$4,148,199	\$4,164,566	\$4,197,465	\$32,899
Tax Levy	(\$27,218)	(\$223,592)	(\$226,703)	(\$319,946)	(\$93,243)
FTE Positions	5.78	5.74	5.00	3.80	(1.20)

How Well We Do It: Performance Measures				
Performance Measure	2015 Actual	2016 Actual	2017 Target	2018 Target
Number of contracts that meet total assessment and monitoring compliance	93.0%	92.0%	95.0%	95.0%

Strategic Overview: The Area Agency on Aging (AAA) is the federally designated lead community agency in planning, research, program development, advocacy and oversight relative to all aging issues in the County. It distributes federal, state and local funds through purchase contracts with home and community based services to provide a comprehensive network of programs designed to allow seniors to live independently and with dignity. Available community-based support includes caregiver support, neighborhood outreach, telephone reassurance services, employment training, and late-life counseling. MCDA provides advocacy services through legal assistance programs and outreach to seniors.

Strategic Implementation: The Milwaukee County 2017-2018 Area Plan lays the blueprint for AAA work. In addition to state and federal directives, the Area Plan also includes input from public hearings to define the Department on Aging's work for serving the older adult community of Milwaukee County. Some of the focus areas in this year's Area Plan are:

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wellness programming, transportation, neighborhood services, and various outreach and advocacy initiatives.

In 2018, there is a decrease in grant funding for SHIP – Benefit Specialist of \$49,000 as well as Title III-B Supportive Services of \$ 20,000. There is a \$99,000 increase in Alzheimer’s contractual related care.

To create more service provider options for older adults and caregivers in Milwaukee County, MCDA will seek efficiencies in existing contracts through increased competition.

New initiatives in the 2018 Budget are as follows:

- By December 31, 2018, MCDA will collaborate with community providers to inform an additional 100 homebound clients about MCDA services
- Due to an increase in state revenue for Alzheimer’s Family Caregiver Support Programs, MCDA can increase access to resource information and counselling services for older adults and their family members that will allow seniors to remain independent in the community.
- MCDA will collaborate with the Wisconsin Institute on Healthy Aging and UW-Madison on two new evidence-based prevention program research projects that target improvements in health and well-being of low-income minority communities. The first research project will be implemented by December 31, 2017 and the second one will be completed by December 31, 2018.
- MCDA will complete “Phase 1” of its senior center assessment project by December 31, 2017 and begin a comprehensive strategic planning process in 2018 to fully assess senior center operations, facilities, and programming.

In 2018, one vacant Program Coordinator position is abolished and related job duties are absorbed by existing staff.

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What We Do: Activity Data				
Activity	2015 Actual	2016 Actual	2017 Target	2018 Target
New Home Delivered meal applications (intake)	1,246	1,114	1,150	1,200
Number of congregate meal sites*	28	25	23	23
Meals served at meal sites	262,179	256,384	290,000	250,000
Home delivered meals	339,351	356,529	320,000	360,000
Number of volunteer hours Reported	50,468	49,560	45,000	45,000

*Count of meal sites as of January 1st of each year.

How We Do It: Program Budget Summary					
Category	2015 Actual	2016 Actual	2017 Budget	2018 Budget	2018/2017 Variance
Expenditures	\$4,906,283	\$4,839,516	\$4,977,453	\$4,971,389	(\$6,064)
Revenues	\$4,709,571	\$4,629,566	\$4,371,236	\$4,434,523	\$63,287
Tax Levy	\$196,711	\$209,950	\$606,217	\$536,866	(\$69,351)
FTE Positions	3.92	3.93	4.00	2.86	(1.14)

How Well We Do It: Performance Measures				
Performance Measure	2015 Actual	2016 Actual	2017 Target	2018 Target
Cost per meal	\$8.11	\$7.94	\$7.94	\$7.94
Percentage of congregate diners reporting satisfaction	88.0%	93.0%	95.0%	95.0%
Percentage of Home Delivered diners reporting satisfaction	95.0%	80.0%	95.0%	95.0%

Strategic Overview: The Department on Aging provides nutritious, balanced, hot lunches at community dining sites and at homes around the County to promote independent living for older adults. The Senior Meal Program operates 23 dining sites throughout the County.

Strategic Implementation: In 2018, an increase in revenue is budgeted primarily due to a greater need for meals. The various sources of this revenue increase are: Title III grant funds for home delivered and congregate meals programs (\$38,000), Medicaid reimbursements for long-term care members (\$15,000), and meal donations from diners (\$10,000).

There has been an ongoing shift in meals served, with community meals decreasing and home delivered meals increasing. This increase in demand for home delivered meals is posing budgetary challenges. The Department will continually monitor program costs of operations to improve service and find efficiencies.

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New initiatives in the 2018 Budget are:

- The use of the State Bureau of Aging and Disability Resource Center's standardized meal cost calculator. The meal cost tool enables effective fiscal management of the meal program through better alignment of revenues and expenses, accurate Medicaid meal reimbursements pricing, and efficient vendor management.
- An increase in suggested diner contributions by \$0.50 to \$3.00 per meal to address the need to cover program costs.
- The Department will implement a targeted campaign at meal sites to increase diner contributions to cover meal costs.

Additionally, one vacant Clerical Assistant 1 position is abolished and related job duties are absorbed by existing staff.

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Strategic Program Area 5: Senior Centers

Service Provision: **Discretionary**

Strategic Outcome: **Quality of Life**

What We Do: Activity Data				
Activity	2015 Actual	2016 Actual	2017Target	2018Target
Members served	7,250	7,022	7,200	7,000
Recreational Activities: Number of Participants				
Exercise	61,296	60,459	61,000	60,000
Nutrition	7,085	5,658	5,700	5,500
Arts/ crafts	19,338	19,722	21,000	19,000
Special events	10,483	9,206	9,300	9,100
Education	11,035	10,480	10,550	10,400
Computer	11,825	9,930	10,000	9,800

How We Do It: Program Budget Summary					
Category	2015 Actual	2016 Actual	2017 Budget	2018 Budget	2018/2017 Variance
Expenditures	\$1,468,785	\$1,440,970	\$1,482,835	\$502,914	(\$979,921)
Revenues	\$24,600	\$1,000	\$40,000	\$0	(\$40,000)
Tax Levy	\$1,444,185	\$1,439,970	\$1,442,835	\$502,914	(\$939,921)
FTE Positions	0.00	0.00	0.00	0.00	0.00

How Well We Do It: Performance Measures				
Performance Measure	2015 Actual	2016 Actual	2017Target	2018Target
Newly scheduled activities	299	405	150	100
Average Satisfaction Survey Score*				
Rose Senior Center	97.0%	99.0%	99.0%	99.0%
Kelly Senior Center	96.0%	97.0%	99.0%	99.0%
McGovern Senior Center	95.0%	97.0%	99.0%	99.0%
Washington Senior Center	95.0%	95.0%	99.0%	99.0%
Wilson Senior Center	98.0%	99.0%	99.0%	99.0%

*Each November at least 100 seniors are given an 11-question survey to gauge their satisfaction with different aspects of senior center programming. These results are aggregated and presented above.

Strategic Overview: The Department uses tax levy funding for programs, services, and major maintenance at the 5 county-owned senior centers. These centers offer a variety of social and recreational activities including: exercise and dance classes, educational and art activities, computers with internet access, pool tables and special events. Senior Centers allow older adults to access vital community services and programs in one location designed to help them stay healthy and independent. Senior advocacy groups provide volunteer and donation opportunities for older adults.

The centers serve as congregate meal sites and home-delivered meal dispatch sites. The centers also distribute federal commodity food boxes (Stock Box) through a collaboration with the Hunger Task Force.

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Strategic Implementation: The senior center service contract is funded through June 1, 2018, after which time the contract will be month-to-month through December 31, 2018. Funding will be based on the annualized contract amount of \$1,122,867. The funding for the contract from June 1, 2018 to December 31, 2018 is held in an allocated contingency account within the Appropriation for Contingencies. The department is requested to provide a report to the Milwaukee County Board by the March 2018 cycle on the feasibility and cost of providing senior center programming with county employees or another contractor beginning June 1, 2018.

Funding of \$200,000 is provided in an allocated contingency account within the Appropriation for Contingencies for potential county startup or contracting costs.

Any plan or contract for senior center programming must require that senior centers are open five days a week, 52 weeks a year.

Revenues decrease by \$40,000 due to elimination of a fundraising event. The Department is implementing an assessment and strategic planning process to explore the feasibility of incorporating senior centers in multi-purpose sites/buildings at some point in the future and to strengthen intergenerational relationships. Phase I of this process is currently being implemented and should be completed by the end of the year.

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Department on Aging Budgeted Positions				
Position Title	2017 Adopted	2018 Budgeted	Variance	Explanation
Accountant3	1.00	1.00	0.00	
Adm Asst NR Exempt	3.00	3.00	0.00	
Administrator Financial Ops Ag	1.00	1.00	0.00	
Assistant Administrative	1.00	1.00	0.00	
Budget Mgr - Aging	1.00	1.00	0.00	
Clerical Asst 1	2.00	1.00	(1.00)	Abolish
Coordinator Care Management	1.00	1.00	0.00	
Coordinator Elder Abuse Preven	1.00	1.00	0.00	
Coordinator Nutrition Outreach	1.00	1.00	0.00	
Director Administration Aging	1.00	1.00	0.00	
Elderly Nutri Program	1.00	1.00	0.00	
Exec Dir Aging	1.00	1.00	0.00	
Executive Assistant Aging	1.00	1.00	0.00	
Human Ser Wkr Aging	36.00	35.00	(1.00)	Abolish
Human Ser Wkr Aging BI Sp	2.00	2.00	0.00	
Info And Outreach Coord Ag	1.00	1.00	0.00	
Office Supp Asst 2	1.00	1.00	0.00	
Paralegal	1.00	1.00	0.00	
Prog and Policy Coord	1.00	1.00	0.00	
Prog Coord - Aging	2.00	1.00	(1.00)	Abolish
Prog Coord - Community Progs	1.00	1.00	0.00	
Prog Coord – Res Center	2.00	2.00	0.00	
Prog Planning Coord	1.00	1.00	0.00	
Quality Imprvt Coord Res Cen	1.00	1.00	0.00	
Resource Mgr Aging	1.00	1.00	0.00	
RN 2 – Dept on Aging	1.00	1.00	0.00	
Secretarial Asst	2.00	2.00	0.00	
Serv Supp Spec	6.00	5.00	(1.00)	Abolish
Serv Supp Spec BI Sp	1.00	1.00	0.00	
Specialist Dementia Care	2.00	2.00	0.00	
Unit Supervisor- LTS	3.00	3.00	0.00	
Grand Total	81.00	77.00	(4.00)	