

**ADOPTED 2005 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.

<b>BUDGET SUMMARY</b>				
<b>Account Summary</b>	2003 Actual	2004 Budget	2005 Budget	2004/2005 Change
Personal Services (w/o EFB)	\$ 8,379,695	\$ 9,144,910	\$ 8,445,103	\$ (699,807)
Employee Fringe Benefits (EFB)	3,177,595	4,911,844	4,582,164	(329,680)
Services	3,668,886	4,178,745	4,127,343	(51,402)
Commodities	1,338,424	2,232,287	2,113,836	(118,451)
Other Charges	104,864,842	114,392,020	141,560,515	27,168,495
Capital Outlay	47,554	119,385	0	(119,385)
County Service Charges	3,342,033	3,430,744	4,624,218	1,193,474
Abatements	(2,077,777)	(2,740,236)	(2,844,630)	(104,394)
<b>Total Expenditures</b>	<b>\$ 122,741,252</b>	<b>\$ 135,669,699</b>	<b>\$ 162,608,549</b>	<b>\$ 26,938,850</b>
State & Federal Revenue	13,743,898	13,189,033	13,981,093	792,060
Other Direct Revenue	106,079,887	119,792,777	145,917,985	26,125,208
<b>Total Direct Revenue</b>	<b>\$ 119,823,785</b>	<b>\$ 132,981,810</b>	<b>\$ 159,899,078</b>	<b>\$ 26,917,268</b>
<b>Direct Property Tax Levy</b>	<b>\$ 2,917,467</b>	<b>\$ 2,687,889</b>	<b>\$ 2,709,471</b>	<b>\$ 21,582</b>

<b>ADDITIONAL COSTS NOT INCLUDED IN TAX LEVY*</b>				
<b>Account Summary</b>	2003 Actual	2004 Budget	2005 Budget	2004/2005 Change
Central Service Allocation	\$ 484,331	\$ 317,698	\$ 425,523	\$ 107,825
Courthouse Space Rental	0	0	0	0
Document Services	61,413	70,345	56,996	(13,349)
Tech Support & Infrastructure	314,589	303,663	357,317	53,654
Distribution Services	13,615	13,699	10,574	(3,125)
Telecommunications	77,989	41,114	24,852	(16,262)
Records Center	7,601	5,193	7,822	2,629
Radio	0	0	0	0
Personal Computer Charges	9,439	49,802	64,554	14,752
Applications Charges	258,207	174,448	325,433	150,985
<b>Total Charges</b>	<b>\$ 1,227,184</b>	<b>\$ 975,962</b>	<b>\$ 1,273,071</b>	<b>\$ 297,109</b>
<b>Direct Property Tax Levy</b>	<b>\$ 2,917,467</b>	<b>\$ 2,687,889</b>	<b>\$ 2,709,471</b>	<b>\$ 21,582</b>
<b>Total Property Tax Levy</b>	<b>\$ 4,144,651</b>	<b>\$ 3,663,851</b>	<b>\$ 3,982,542</b>	<b>\$ 318,691</b>

\* These costs are included in other departmental and non-departmental budgets. They are reflected here to show the "total" amount of tax levy support for this Department.

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<b>PERSONNEL SUMMARY</b>				
	2003 Actual	2004 Budget	2005 Budget	2004/2005 Change
Personal Services (w/o EFB)	\$ 8,379,695	\$ 9,144,910	\$ 8,445,103	\$ (699,807)
Employee Fringe Benefits (EFB)	\$ 3,177,595	\$ 4,911,844	\$ 4,582,164	\$ (329,680)
Position Equivalent (Funded)*	197.6	183.7	158.5	(25.2)
% of Gross Wages Funded	82.3	96.0	98.2	2.2
Overtime (Dollars)**	\$ 232,093	\$ 109,116	\$ 109,116	\$ 0.0
Overtime (Equivalent to Positions)	6.1	2.4	1.9	(0.5)

\* For 2003, the Position Equivalent is the budgeted amount.

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

<b>PERSONNEL CHANGES</b>				
Job Title/Classification	Action	Number of Positions/ Total FTE	Division	Cost of Positions (Excluding Fringe Benefits)
Contract Records Specialist - Aging	Abolish	2/2.0	Administration	\$ (65,428)
Secretarial Asst	Abolish	1/1.0	Administration	(29,546)
Fiscal Analyst	Create	1/1.0	Administration	47,296
Service Support Supervisor	Abolish	1/1.0	Resource Center	(44,584)
Human Service Worker (Aging)	Abolish	8/8.0	Resource Center	(392,992)
Office Support Asst 1	Abolish	1/1.0	Resource Center	(33,376)
Unit Supervisor - Long Term Support	Abolish	1/1.0	CMO	(49,128)
Contract Administrator	Abolish	1/1.0	CMO	(61,778)
Registered Nurse 2	Abolish	3/3.0	CMO	(153,300)
Program Coordinator - DD	Abolish	1/1.0	CMO	(53,868)
Human Service Worker (Aging)	Abolish	12/12.0	CMO	(434,924)
			<b>TOTAL</b>	<b>\$ (1,271,628)</b>

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<b>ORGANIZATIONAL COST SUMMARY</b>					
<b>DIVISION</b>		<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2004/2005</b>
		<b>Actual</b>	<b>Budget</b>	<b>Budget</b>	<b>Change</b>
Administration	Expenditure	\$ 848,653	\$ 2,368,244	\$ 2,289,697	\$ (78,547)
	Abatement	(859,182)	(2,273,024)	(2,289,673)	(16,649)
	Revenue	188,093	0	0	0
	Tax Levy	\$ (198,622)	\$ 95,220	\$ 24	\$ (95,196)
Elderly Services	Expenditure	\$ 3,880,814	\$ 3,348,890	\$ 3,640,175	\$ 291,285
	Abatement	(100,864)	(11,158)	(8,411)	2,747
	Revenue	2,966,477	2,875,623	3,098,687	223,064
	Tax Levy	\$ 813,473	\$ 462,109	\$ 533,077	\$ 70,968
Elderly Nutrition	Expenditure	\$ 4,548,688	\$ 4,465,562	\$ 4,410,801	\$ (54,761)
	Abatement	(94,959)	(8,123)	(4,121)	4,002
	Revenue	4,475,745	4,167,092	4,220,714	53,622
	Tax Levy	\$ (22,016)	\$ 290,347	\$ 185,966	\$ (104,381)
Senior Centers	Expenditure	\$ 1,124,659	\$ 1,312,182	\$ 1,318,550	\$ 6,368
	Revenue	70,169	0	0	0
	Tax Levy	\$ 1,054,490	\$ 1,312,182	\$ 1,318,550	\$ 6,368
Resources: Community Alternatives/Intervention Services	Expenditure	\$ 8,242,785	\$ 8,177,904	\$ 9,416,006	\$ 1,238,102
	Abatement	(983,572)	(163,445)	(392,324)	(228,879)
	Revenue	7,104,655	6,903,474	7,696,804	793,330
	Tax Levy	\$ 154,558	\$ 1,110,985	\$ 1,326,878	\$ 215,893
Care Management Coordinated Services	Expenditure	\$ 106,173,430	\$ 118,737,153	\$ 144,377,950	\$ 25,640,797
	Abatement	(39,200)	(284,486)	(150,101)	134,385
	Revenue	105,018,646	119,035,621	144,882,873	25,847,252
	Tax Levy	\$ 1,115,584	\$ (582,954)	\$ (655,024)	\$ (72,070)

**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.

The Department integrates several Federal and State revenue streams including the Older Americans Act, the Senior Community Services Program, the Alzheimer's Family and Caregiver Support Program (AFCSP), Base Community Aids (BCA), and Family Care.

**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 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 replaces the state's numerous Long Term Support programs, including the Community Options Program (COP), COP Waiver, and Community Integration Program (CIP) with a single, integrated Long Term Care entitlement program.

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<b>COMMUNITY AIDS FOR THE DEPARTMENT ON AGING</b>			
	<b>2004 Budget</b>	<b>2005 Budget</b>	<b>2004/2005 Change</b>
<b>I. Programs Requiring Match</b>			
Base Allocation	\$ 2,614,290	\$ 2,603,974	\$ (10,316)
Adult Protective Services	179,029	179,029	0
Sub-Total	\$ 2,793,319	\$ 2,783,003	\$ (10,316)
<b>II. Other Programs</b>			
Alzheimer Caregiver	\$ 242,158	\$ 242,195	\$ 37
Sub-Total	\$ 242,158	\$ 242,195	\$ 37
<b>Grand Total</b>	<b>\$ 3,035,477</b>	<b>\$ 3,025,198</b>	<b>\$ (10,279)</b>

**Administration** consists of the Director's Office and the Fiscal and Support Services Division.

interested in meeting the needs of older adults in the community.

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.

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

The purposes of the program are:

This division also develops the Department's fiscal policies and assesses operations for effectiveness and efficiency.

1. To provide older persons, particularly those with low incomes, low-cost, nutritionally sound meals in strategically located congregate sites. Two of the 32 meal sites offer weekend meals to program participants. The program also seeks to reduce the social isolation of participants by providing supportive services including recreation, education and information about other programs and services available to older adults.
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 provides limited gap-filling services in addition to meals.

**Area Agency Services** provide a comprehensive network of support services through community-based agencies that assist older adults to remain independent in their homes as long as possible. These programs are funded through the Older Americans Act and State revenue earmarked for elderly services. The unit 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 assist with contract development and coordinate the request for proposals process with other County departments.

The **Resource Center** unit acts as the entry point for the Department's Family Care benefits 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 services for persons 60 years of age and older.

The Area Agency Services unit provides staff support to the Milwaukee County Commission on Aging, its five standing committees and its Advisory Council. Unit staff assist the Commission in conducting public hearings and needs assessments as required under Federal statute, provide technical assistance and serve as a resource for businesses, access to universities and voluntary organizations

As a major component of the State of Wisconsin Family Care initiative, this unit has four primary

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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. The Resource Center's other major 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)** unit was created in response to the Family Care initiative. In accordance with authorization initially granted by the County Board in 1997 (Resolution File No. 96-630) and 1998 (Resolution File No. 98-893), under Family Care, the Department's Care Management Organization coordinates all long term care services, including home and community based services and institutional services for eligible elders who require publicly funded long term care services. Using inter-disciplinary teams of nurses, human service workers, other professionals, and volunteers, the unit oversees the provision of a comprehensive package of service benefits. These include Adult Day Care, Supportive Home Care, transportation, accessibility equipment and home modifications, residential care services, money management, durable medical equipment, home health care, personal care, skilled nursing services, and skilled nursing home care. In return for coordinating and managing these services, the Department's CMO receives a capitated rate payment per member per month from the State.

### BUDGET HIGHLIGHTS

#### DEPARTMENTAL

- Personal Services expenditures without fringe benefits decreased by \$699,807 from \$9,144,910 to \$8,445,103. Funded positions decreased 25.2 from 183.7 to 158.5.
- The 2005 expenditures increased by \$26,938,850 and the revenues also increased by \$26,917,268. This is primarily due to increased expenditures and revenues in the CMO of \$26,817,716.
- The 2005 Budget reflects a zero wage increase for all represented, non-represented and Executive Compensation Plan (ECP) positions. In addition, ECP positions are not provided step increases or performance awards in 2005 as allowed in County Ordinance Section 17.265 (3).
- 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."

#### ADMINISTRATION

- (\$65,428) Abolish 2 Contract Records Spec  
(29,546) Abolish 1 Secretary Asst  
(33,376) Abolish 1 Office Support Assistant 1  
47,296 Create 1 Fiscal Analyst  
(\$81,054) Total

The Fiscal and Support Services Division is being reorganized to dedicate more technical resources to reporting and fiscal management of the organization. One Secretary Assistant position and two Contract Records Specialists positions are abolished and one Fiscal Analyst is created in this Division. Additionally, one Office Support Assistant 1 is abolished in the Resource Center and one Clerical Assistant 1 position is transferred to the Resource Center as part of this initiative.

- State and Federal revenues increase by \$792,060 to a total of \$13,981,093 in 2005. This

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is primarily due to increased revenue in the following areas: Resource Center Wellness and Prevention Program, Income Maintenance federal match and Title III-C-1 (Congregate Meals).

receive food boxes each month at no additional cost to the Senior Meal Program or the seniors.

**ELDERLY SERVICES**

- In 2004 the Department on Aging received a Robert Wood Johnson Foundation (RWJ) Community Partnerships for Older Adults grant to fund their Connecting Caring Communities initiative. This is a four-year grant. In 2005, the second year of the grant, RWJ will contribute \$187,956, which is slightly over the 2004 funding of \$187,543. Additionally, \$30,000 in funding is budgeted from each Helen Bader, Faye McBeath and the Greater Milwaukee Foundations as matching dollars. The total four-year grant is \$1,110,000.

**SENIOR CENTERS**

- A principal challenge of operating the five County owned senior centers continues to be maintenance of the facilities. In 2005, DAS Fiscal Affairs and the Department on Aging will work together to develop a long-range capital and operating plan for addressing this need.
- The Department on Aging will continue to seek grant funding and partnerships to sustain and expand fitness and physical activity programming at senior centers. The Department will also continue efforts to develop the infrastructure for a nationally significant study of the positive effects of physical activity on quality of life over the course of the aging process.

**SENIOR MEAL PROGRAM**

	2004 Budget	2005 Budget	2004/2005 Change
Number of Meal Sites Open	33	32	(1)
Number of Meals Served at Meal Sites	408,658	458,500	49,842
Home-Delivered Meals	206,710	224,784	18,074
Total Meals Served	615,368	683,284	67,916

**RESOURCES: COMMUNITY ALTERNATIVES INTERVENTION SERVICES DIVISIONS (RESOURCE CENTER)**

	2004 Budget	2005 Budget
Pre-admission Consultations	1,200	1,200
Functional Screens	3,500	3,500
Information Calls	65,000	80,000

- The number of meals served increases based on experience.
- In June 2004, a meal site was opened at the Franklin City Hall Community Room. This location became reality after several years of study and assessment of the needs of the elderly in the southwest area of Milwaukee County. The cost of the Franklin City Hall Community Room is offset by prior meal site closings.
- Coordination with the Commodity Supplemental Food Program (administered by the Hunger Task Force) and the Reach Program (administered by Second Harvest) continues to enable participants at various meal sites to

- Information calls are expected to increase in 2005 based on experience.
- (\$392,992) Abolish 8 Human Service Worker (Aging)  
 (44,584) Abolish 1 Service Support Supv  
 (\$437,576) Total
- Abolishment of 8 Human Service Worker positions including 6 positions previously offset by the vacancy and turnover factor and one vacant Service Support Supervisor reflects a staffing level appropriate for the workload of the Resource Center.
- In 2005, eight additional positions (six Economic Support Specialists (ESS), one Economic Support Supervisor and one Office Support Assistant 2) in the Economic Support Division

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under the Department of Health and Human Services (DHHS-ESD) will be dedicated to Family Care eligibility determination and related functions. This will provide for two units with 9 ESS's, one Supervisor and one clerical support position, as opposed to one 12-person unit. This initiative yields a total of 22 Family Care related positions in DHHS-ESD. The Department on Aging will be cross-charged a total of \$1,231,420 for all personal services costs, which is offset by supplemental State Family Care IM revenue. One position of Quality Assurance Technician will be paid through regular IM revenue.

**CARE MANAGEMENT COORDINATED  
 SERVICES DIVISION  
 (CARE MANAGEMENT ORGANIZATION)**

	2004	2005
	Budget	Budget
CMO Enrollments	1,000	557
CMO Clients Served	5,800	6,242

- At the end of 2003, the Care Management Organization (CMO) had a deficit of \$5.6 million. This includes \$3.3 million in Level of Care over payments from the State of Wisconsin and \$2.3 million in 2002 outstanding accounts issues. Since then, the Department on Aging has worked to address the deficit and financial operating concerns in the CMO. The CMO has instituted various safeguards including an aggressive billing campaign to better recover room and board and cost share revenues, monthly reconciliation of member information with the Economic Support staff in the Department of Health and Human Services to maximize capitation revenue, twice weekly meetings between DHHS and CMO staff to streamline communications, and production of monthly reports for the State to confirm overpayments ensuring that these are not booked as revenue and funds will be available when the State requires reimbursement.
- DAS will continue to provide fiscal oversight for the Department and the CMO until it is assured that these issues are resolved and managed effectively.

- In 2000, the CMO was launched as a pilot project in Milwaukee County. As of July 1, 2002, Family Care became an entitlement for all eligible older adults in Milwaukee County, thus reflecting a significant expansion of the program. Prior to January 1, 2004, the State Department of Health and Family Services (DHFS) could not contract with an organization other than the County to operate a care management organization. As of January 2004, DHFS is permitted to contract on the basis of quality with any entity certified to meet CMO requirements. The Department on Aging was awarded the CMO contract by DHFS in November 2004 and they will serve as the sole CMO for Milwaukee County in 2005.
- Effective January 1, 2005 the CMO will be operated as an enterprise fund in accordance with the requirements made by the State of Wisconsin. The establishment of such a fund will result in the consolidation of additional accounting and finance functions that will further improve financial reporting timeliness, financial disclosure and create operating efficiencies.
- Expenditures and revenues in the CMO increased by \$26,817,716. This is based on experience and projected 2004 actuals.
- (\$434,924) Abolish 12 Human Service Worker (Aging)  
 (49,128) Abolish 1 Unit Supervisor-Long Term Support  
 (61,778) Abolish 1 Contract Administrator  
 (53,868) Abolish 1 Program Coord-DD  
(153,300) Abolish 3 RN 2 - (Aging)  
 (\$752,998) Total

Based on experience and the CMO's continued efforts to achieve proper staffing levels the above mentioned 18 vacant positions are abolished.