

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

| Category | 2016 Actual | 2017 Actual | 2018 Budget | 2019 Budget | 2019/2018 Variance |
|----------------------------------|----------------------|----------------------|----------------------|---------------------|--------------------|
| Expenditures | | | | | |
| Personnel Costs | \$7,267,963 | \$7,426,870 | \$8,598,888 | \$9,270,182 | \$671,294 |
| Operation Costs | \$9,839,540 | \$10,067,848 | \$9,065,965 | \$9,862,808 | \$796,843 |
| Debt & Depreciation | \$0 | \$0 | \$0 | \$0 | \$0 |
| Capital Outlay | \$116,627 | \$100,859 | \$100,000 | \$130,859 | \$30,859 |
| Interdept. Charges | \$971,039 | \$998,857 | \$1,045,524 | \$1,033,438 | -\$12,086 |
| Total Expenditures | \$18,195,169 | \$18,594,433 | \$18,810,377 | \$20,297,287 | \$1,486,910 |
| <i>Legacy Healthcare/Pension</i> | <i>\$2,114,049</i> | <i>\$2,372,406</i> | <i>\$2,946,403</i> | <i>\$3,380,496</i> | <i>\$434,093</i> |
| Revenues | | | | | |
| Direct Revenue | \$1,104,214 | \$830,814 | \$909,000 | \$902,978 | (\$6,022) |
| Intergov Revenue | \$16,129,369 | \$16,275,348 | \$16,050,349 | \$16,603,807 | \$553,458 |
| Indirect Revenue | \$0 | \$0 | \$0 | \$0 | \$0 |
| Total Revenues | \$17,233,583 | \$17,106,162 | \$16,959,349 | \$17,506,785 | \$547,436 |
| Tax Levy | \$961,587 | \$1,488,271 | \$1,851,028 | \$2,790,502 | \$939,474 |
| Effective Tax Levy* | (\$3,300,633) | (\$3,045,705) | (\$3,737,436) | (3,266,835) | \$470,601 |
| Personnel | | | | | |
| Full-Time Pos. (FTE)** | 68.00 | 67.00 | 77.00 | 76.17 | -0.83 |
| Seas/Hourly/Pool Pos. | 0 | 0 | 0 | 0 | 0 |
| Overtime \$ | \$32,977 | \$12,324 | \$0 | \$26,280 | \$26,280 |

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

** The Actual FTE count throughout the document reflects the full-time equivalent positions in the Department as of pay period 26.

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 Milwaukee County ARC is also the single point of entry into publicly funded long-term care programs for residents aged sixty and over. The Administration provides oversight over a wide range of aging programs and services for the County's large and diverse senior population.

DEPARTMENT ON AGING (7900) BUDGET

Department: **Department on Aging**

UNIT NO. 7900

FUND: **General — 0001**

Major Changes in FY 2019: The Milwaukee County Department of Aging continues to address the increasing service needs of an expanding senior population. The focus in 2019 is to extend support services with the greatest impact and to expand reach within the County's older adult population.

To serve a growing population of seniors in the County, the Department will extend and improve its services through the following initiatives:

- The Department strives to promote competition among vendors to provide operationally sound and cost-effective contractual service options that serve Milwaukee County's seniors. The Department continues to work with the Department of Administrative Services to refine its Request For Proposal (RFP) documents and processes to maximize competition within each service area.
- The Department's 2019-2021 Area Aging Plan prioritizes senior needs such as wellness programming, transportation, senior center programming, and nutrition programs. The Department is building partnerships with the North Shore Health Department, North Shore Fire Department, South Milwaukee Health Department, and Greendale Health Department to expand evidence-based prevention programs that will improve their health and well-being of Milwaukee County seniors.
- The Department serves as the Milwaukee County Aging Resource Center. It provides a wide variety of services to support seniors sixty years and older. In 2019, the federal revenue from Medicaid reimbursement funds is projected to grow by approximately \$570,000 due to State and Federal changes in time reporting. This allows for greater recovery of expenditures through revenue reimbursements.

DEPARTMENT ON AGING (7900) BUDGETDepartment: **Department on Aging**UNIT NO. **7900**FUND: **General — 0001****Strategic Program Area 1: Administration****Service Provision:** Mandated**Strategic Outcome:** High quality, responsive services

| What We Do: Activity | | | | |
|-------------------------|-------------|-------------|-------------|-------------|
| Activity | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Senior Admin: Staff FTE | 1:79 | 3:81 | 3:77 | 3:76 |

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

| How We Do It: Program Budget Summary | | | | | |
|--------------------------------------|-------------|-------------|-------------|-------------|--------------------|
| Category | 2016 Actual | 2017 Actual | 2018 Budget | 2019 Budget | 2019/2018 Variance |
| Expenditures | (\$9,065) | (\$15,721) | \$0 | \$0 | \$0 |
| Revenues | \$100 | (\$653) | \$0 | \$0 | \$0 |
| Tax Levy | (\$9,165) | (\$15,068) | \$0 | \$0 | \$0 |
| FTE Positions | 5.00 | 7.00 | 7.00 | 7.00 | 0.00 |

| How We Do It: Performance Measures | | | | |
|--------------------------------------|----------------|----------------|---------------|----------------|
| Performance Measure | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Revenue* dollars/fiscal staff | \$17,234:3 | \$17,106:4 | \$16,959:4 | \$17,507:4 |
| Overtime costs/personal service cost | \$33 / \$7,268 | \$12 / \$7,427 | \$0 / \$8,599 | \$26 / \$9,270 |

**Revenues and expenditures are stated in \$1000's.*

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 2019, 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, Information Management Services Division (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 and Disability Resource Center Governing Board support.

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

To provide more robust fiscal support to the Department, in 2018, the vacant position of Administrative Assistant - Fiscal is reclassified to Accounting Assistant. The 2019 budget continues to provide improved financial controls and enhanced reporting by reclassing Accountant III position to Accounting Supervisor.

Strategic Program Area 2: Aging Resource Center

Service Provision: Mandated

Strategic Outcome: Quality of Life

| What We Do: Activity | | | | |
|---|--------------------|--------------------|--------------------|--------------------|
| Activity | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Number of people contacted at outreach events | 13,232 | 12,888 | 13,500 | 13,500 |
| Number of consumer calls | 47,207 | 41,963 | 47,500 | 42,000 |
| Options Counselling cases | 5,137 | 5,254 | 5,000 | 5,200 |
| Long Term Care applications | 2,367 | 2,738 | 2,000 | 2,700 |
| Long Term Care enrollments | 1,940 | 2,236 | 2,000 | 2,300 |
| Elder Abuse calls | 942 | 973 | 1,100 | 1,000 |

| How We Do It: Program Budget Summary | | | | | |
|---|--------------------|--------------------|--------------------|--------------------|---------------------------|
| Category | 2016 Actual | 2017 Actual | 2018 Budget | 2019 Budget | 2019/2018 Variance |
| Expenditures | \$7,999,141 | \$8,324,601 | \$9,458,555 | \$10,088,414 | \$629,859 |
| Revenues | \$8,454,718 | \$8,444,188 | \$8,327,361 | \$8,994,883 | \$667,522 |
| Tax Levy | (\$455,577) | (\$119,587) | \$1,131,194 | \$1,093,531 | (\$37,663) |
| FTE Positions | 56.00 | 55.00 | 63.00 | 62.17 | -0.83 |

| How Well We Do It: Performance Measures | | | | |
|--|--------------------|--------------------|--------------------|--------------------|
| Performance Measure | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| 100% Time reporting Medicaid match | 39.6% | 43.4% | 39.5% | 45.0% |
| Average time in phone queue (minutes)* | 3.57 | 5.95 | 5.00 | 5.00 |

*The increase in target average time in phone queue is mostly a reflection of the complexity of cases handled by 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 initiating Chapter 55 guardianships. The ARC’s WATTS Unit oversees County seniors who are protectively placed.

Strategic Implementation: The Aging Resource Center is partially supported through State grant funding and Medicaid reimbursement funds. In 2019, major revenue changes include decreases of: \$44,976 in Innovation Grant funds and \$85,195 in Dementia Care Specialist African American Communities grant funding. These decreases are mitigated by State revenue increases of \$54,000 from Medicare Improvements for Patients and Providers Act (MIPPA), \$580,000 in Federal reimbursements for ARC services, and \$172,000 in the Base County Allocation to the ARC functional area.

DEPARTMENT ON AGING (7900) BUDGET

Department: **Department on Aging**

UNIT NO. **7900**

FUND: **General — 0001**

In 2019, 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.

In 2019, one full time Dementia Care Specialist position is fully funded for the first two months of the year due to the elimination of grant funding.

DEPARTMENT ON AGING (7900) BUDGETDepartment: **Department on Aging**UNIT NO. **7900**FUND: **General — 0001****Strategic Program Area 3: Area Agency**Service Provision: **Mandated**Strategic Outcome: **Quality of Life**

| What We Do: Activity Data | | | | |
|---|--------------------|--------------------|--------------------|--------------------|
| Activity | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Job readiness training group sessions | 136 | 94 | 160 | 115 |
| Mature workers: number employed | 79 | 106 | 80 | 100 |
| Legal assistance: consultation hours | 10,945 | 10,945 | 8,000 | 11,000 |
| Legal assistance: seniors served | 1,154 | 1,256 | 1,100 | 1,250 |
| Transit/van rides provided to seniors | 103,462 | 89,910 | 91,900 | 93,000 |
| Alzheimer's Counseling and Community Support: number of people served | 3,050 | 4,322 | 3,200 | 3,500 |
| Evidence Based Prevention (EBP) program participants | 556 | 572 | 635 | 700 |
| Number of people trained in the EBP leadership initiative | 37 | 21 | 23 | 25 |
| Number of individuals reached through one-on-one outreach* | NA | NA | NA | 900 |

*The Department has started tracking this activity from 2018.

| How We Do It: Program Budget Summary | | | | | |
|---|--------------------|--------------------|--------------------|--------------------|---------------------------|
| Category | 2016 Actual | 2017 Actual | 2018 Budget | 2019 Budget | 2019/2018 Variance |
| Expenditures | \$3,924,607 | \$3,775,071 | \$3,877,519 | \$3,901,664 | \$24,145 |
| Revenues | \$4,148,199 | \$4,343,750 | \$4,197,465 | \$3,755,580 | (\$441,885) |
| Tax Levy | (\$223,592) | (\$568,679) | (\$319,946) | \$146,084 | \$466,030 |
| FTE Positions | 4.00 | 2.00 | 4.00 | 4.00 | 0.00 |

| How Well We Do It: Performance Measures | | | | |
|---|--------------------|--------------------|--------------------|--------------------|
| Performance Measure | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Number of contracts that meet total assessment and monitoring compliance | 92.0% | 100.0% | 95.0% | 100.0% |
| Percentage of survey customers who learn something useful about MCDA services at a community presentation* | NA | NA | NA | 90% |
| Percentage of Evidence-Based Prevention Program (EBPP) participants who rate a class as "Excellent" or "Good" | NA | NA | NA | 90% |

*Individuals at community presentations are asked to what extent they agree that they learned something useful about services that can help them. The benchmark is set at 90% of customers responding they "somewhat agree" or "strongly agree" that they learned something useful during the presentation.

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 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. The Department is in the process of developing its 2019-2021 Area Plan and will submit a final plan to the Wisconsin Department of Health Services by the end of 2018. Some of the focus areas in the 2019-2021 Area Plan are: wellness programming, transportation, neighborhood services, senior center programming, and various outreach and advocacy initiatives.

In 2019, there is an increase in grant funding for State Health Insurance Assistance Program (SHIP) of \$35,750. This increase is mitigated by decreases in Older American Act funding of \$14,495 and in the Base County Allocation to the AAA functional area of \$472,000.

MCDA will continue its work in 2019 to create more service provider options for older adults and caregivers in Milwaukee County by seeking efficiencies in existing contracts and increasing competition among service providers.

New initiatives in the 2019 Budget are as follows:

- MCDA will collaborate with UW-Madison and other partners to implement a pilot HelpCare Connect program that is targeted at connecting family caregivers with new technology that is aimed at improving or enhancing their caregiving capabilities. MCDA will also be expanding its "Stepping On" program through a first-time partnership with the North Shore Health Department and North Shore Fire Department, South Milwaukee Health Department, and Greendale Health Department. The Department will also be expanding its "Living Well With Chronic Conditions" program through a partnership with the Greenfield Health Department, Greenfield Fire Department, and City of Milwaukee Department of Employee Relations. The Department will also be expanding its "Healthy Living with Diabetes" program through a new partnership with the City of Milwaukee Health Department and the South Side Health Center.
- MCDA will continue its process to plan for the future of the five Milwaukee County-owned senior centers. The Department completed its "Phase I" assessment in 2018, and it will continue to explore cost-effective programming alternatives that provide an expanded array of activities and services to Milwaukee County seniors at a funding level that is sustainable.

Strategic Program Area 4: Senior Meal Program

Service Provision: Mandated

Strategic Outcome: Quality of Life

| What We Do: Activity Data | | | | |
|---|--------------------|--------------------|--------------------|--------------------|
| Activity | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| New Home Delivered meal applications (intake) | 1,114 | 1208 | 1,200 | 1,250 |
| Number of congregate meal sites* | 25 | 23 | 23 | 23 |
| Meals served at meal sites | 256,384 | 245,294 | 250,000 | 230,000 |
| Home delivered meals | 356,529 | 369,071 | 360,000 | 400,000 |
| Number of volunteer hours reported | 49,560 | 47,452 | 45,000 | 45,000 |

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

| How We Do It: Program Budget Summary | | | | | |
|---|--------------------|--------------------|--------------------|--------------------|---------------------------|
| Category | 2016 Actual | 2017 Actual | 2018 Budget | 2019 Budget | 2019/2018 Variance |
| Expenditures | \$4,839,516 | \$5,055,414 | \$4,971,389 | \$5,012,821 | \$41,432 |
| Revenues | \$4,629,566 | \$4,314,384 | \$4,434,523 | \$4,756,322 | \$321,799 |
| Tax Levy | \$209,950 | \$741,031 | \$536,866 | \$256,499 | (\$280,367) |
| FTE Positions | 3.00 | 3.00 | 3.00 | 3.00 | 0.00 |

| How Well We Do It: Performance Measures | | | | |
|---|--------------------|--------------------|--------------------|--------------------|
| Performance Measure | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Cost per meal | \$7.94 | \$8.25 | \$7.94 | \$8.25 |
| Percentage of congregate diners reporting satisfaction | 93.0% | 86.0% | 95.0% | 95.0% |
| Percentage of Home Delivered Meals reporting satisfaction | 80.0% | 94.0% | 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 2019, an increase in revenue is budgeted primarily due to a greater need for meals. The primary sources of revenue increases are: the federal Older American Act funds for home delivered and congregate meals programs (\$30,000) and assignment of Base County Allocation funds (\$300,000) to the Senior Meal Program functional area.

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.

DEPARTMENT ON AGING (7900) BUDGET

Department: **Department on Aging**

UNIT NO. **7900**

FUND: **General — 0001**

New initiatives in the 2019 Budget are:

- Design and implement targeted campaigns aimed at increasing diner contributions to \$3.00 per meal. The Department will also create a monthly statement of expenditures for each meal site to highlight the gap between the actual meal cost and average diner contribution at each site.
- The number of congregate diners continues to decrease. The Department will implement a pilot program to serve meals at different times of the day, including supper programs at select locations, to increase participation in the congregate meal program.
- The Department plans to extend the reach of the meal program by entering a new contractual relationship with area managed care organizations.

Strategic Program Area 5: Senior Centers

Service Provision: Discretionary

Strategic Outcome: Quality of Life

| What We Do: Activity Data | | | | |
|--|--------------------|--------------------|--------------------|--------------------|
| Activity | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Members served | 7,022 | 6,437 | 7,000 | 7,000 |
| Recreational Activities: Number of Participants | | | | |
| Exercise | 60,459 | 55,814 | 60,000 | 60,000 |
| Nutrition | 5,658 | 5,388 | 5,500 | 5,500 |
| Arts/ crafts | 19,722 | 20,631 | 19,000 | 19,000 |
| Special events | 9,206 | 2,897* | 3,000 | 3,000 |
| Education | 10,480 | 10,295 | 10,400 | 10,400 |
| Computer | 9,930 | 10,371 | 9,800 | 10,000 |

*The definition and categorization of special events changed from 2016 to 2017.

| How We Do It: Program Budget Summary | | | | | |
|---|--------------------|--------------------|--------------------|--------------------|---------------------------|
| Category | 2016 Actual | 2017 Actual | 2018 Budget | 2019 Budget | 2019/2018 Variance |
| Expenditures | \$1,440,970 | \$1,455,068 | \$502,914* | \$1,294,388 | \$791,474 |
| Revenues | \$1,000 | \$4,493 | \$0 | \$0 | \$0 |
| Tax Levy | \$1,439,970 | \$1,450,575 | \$502,914 | \$1,294,388 | \$791,474 |
| FTE Positions | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

*In the 2018 Adopted Budget, \$655,006 or estimated expenditures for 7-months of senior center programming was moved out of the Department's budget into the County-wide Allocated Contingency Fund.

| How Well We Do It: Performance Measures | | | | |
|--|--------------------|--------------------|--------------------|--------------------|
| Performance Measure | 2016 Actual | 2017 Actual | 2018 Target | 2019 Target |
| Average Satisfaction Survey Score* | | | | |
| Rose Senior Center | 99.0% | 99.0% | 99.0% | 99.0% |
| Kelly Senior Center | 97.0% | 97.0% | 99.0% | 99.0% |
| McGovern Senior Center | 97.0% | 97.0% | 99.0% | 99.0% |
| Washington Senior Center | 95.0% | 95.0% | 99.0% | 99.0% |
| Wilson Senior Center | 99.0% | 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.

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

AGING (7900) BUDGET

DEPT: Aging

UNIT NO. 7900
FUND: General – 0001

Strategic Implementation: In 2019, an increase in expenditure is budgeted primarily due to the displacement of seven-month senior center programming funds to the allocated contingency fund in the 2018 Adopted Budget, and an increase of \$31,000 in senior center facility maintenance. MCDA continues to require any contract for programming to ensure that senior centers are open five days a week, 52 weeks a year, except for scheduled maintenance.

The Department is in the process of assessing the programming and operations of the existing county-owned senior centers as well as the cost-effectiveness of the existing senior center model. The Department expects to continue its planning efforts into 2019 to find a programming solution that meets the needs of today's and tomorrow's seniors.