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

Category	2017 Actual	2018 Actual	2019 Budget	2020 Budget	2020/2019 Variance
Expenditures					
Personnel Costs	$7,426,870	$8,156,152	$9,221,980	$9,396,108	$174,128
Operation Costs	$10,067,848	$9,970,612	$9,875,520	$9,927,431	$51,911
Debt & Depreciation	$0	$0	$0	$0	$0
Capital Outlay	$100,859	$106,259	$130,859	$0	($130,859)
Interdept. Charges	$998,857	$980,898	$1,033,438	$993,663	($39,775)
Total Expenditures	**$18,594,433**	**$19,213,921**	**$20,261,797**	**$20,317,202**	**$55,405**
Revenues					
Direct Revenue	$830,814	$660,124	$902,978	$844,630	($58,348)
Intergov Revenue	$16,275,348	$17,146,222	$16,603,807	$17,159,443	$555,636
Indirect Revenue	$0	$0	$0	$0	$0
Total Revenues	**$17,106,162**	**$17,806,346**	**$17,506,785**	**$18,004,073**	**$497,288**
Tax Levy	**$1,488,271**	**$1,407,576**	**$2,755,012**	**$2,308,654**	**($446,358)**
Effective Tax Levy*	**($3,045,705)**	**($3,904,980)**	**($3,227,250)**	**($3,738,458)**	**($511,208)**
Personnel					
Full-Time Pos. (FTE)	76.4	73.3	75.8	73.9	(1.9)
Seas/Hourly/Pool Pos.	0	0	0	0	0
Overtime $	$12,324	$23,938	$26,280	$9,048	($17,232)

Effective Tax Levy excludes interdepartmental charges and fringe benefit costs.

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 into 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 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.

Major Changes in FY 2020: The Milwaukee County Department of Aging continues to address the increasing service needs of an expanding senior population. The focus in 2020 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 serves as the Milwaukee County Aging Resource Center. It provides a wide variety of services to support seniors sixty years and older. In 2020, Federal revenue from Medicaid reimbursement funds is projected to grow by approximately $61,000 due to State and Federal changes in time reporting. This allows for greater recovery of expenditures through revenue reimbursements.

- Compared to 2019, the Department expects increased Title III funding through the Older Americans Act. This increase of $444,000 will help expand various services offered to seniors in Milwaukee County. Purchase of service contracts reflect a net increase of $305,168. Service expansions are budgeted in the following areas: caregiver services to seniors with Alzheimer's and Dementia; additional Evidence Based Programming; and expanded senior nutrition and socialization opportunities.

- The Department continues to focus efforts on staff retention and recruitment. In the 2020 Budget, approximately $50,000 is earmarked for salary increases to create equity within the Department and bring staff closer to the current market.

- New in 2020, the Department scrutinizes services based on racial equity impact. The budget continues a 2019 initiative to fund a senior center and nutrition services in zip code 53206, with a minority population of 97.5%. Additionally, funding enhancements are made to two nutrition sites in zip code 53204 with a minority population of 77.1%.

In 2020, 1.0 FTE Secretarial Assistant position is unfunded and job duties are realigned within the Department.

Strategic Program Area 1: Administration

Service Provision: **Mandated**

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

What We Do: Activity				
Activity	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Admin: Staff FTE ratio*	3:67	3:61	3:77	3:76

How We Do It: Program Budget Summary					
Category	**2017 Actual**	**2018 Actual**	**2019 Budget**	**2020 Budget**	**2020/2019 Variance**
Expenditures	($15,721)	($87,556)	$30,214	$4,475	($25,739)
Revenues	($653)	($134)	$0	$0	$0
Tax Levy	($15,068)	($87,422)	$30,214	$4,475	($25,739)
FTE Positions	6.5	5.5	5.5	6.7	1.2

How We Do It: Performance Measures				
Performance Measure	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Revenue dollars/fiscal staff	$17,106:4	$17,806:4	$17,507:4	$17,999: 4
Overtime costs/personal service cost	$12 / $7,427	$24 / $8,156	$26 / $9,222	$9 / $9,448

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 2020, the Department seeks efficiencies in operations through a review of program and service offerings. MCDA continues 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 Disability Resource Center Governing Board support.

Revenues from other program areas completely offset administrative service costs.

Strategic Program Area 2: Aging Resource Center

Service Provision: **Mandated**

Strategic Outcome: **Quality of Life**

What We Do: Activity				
Activity	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Number of people contacted at outreach events	10,650	10,822	10,850	11,000
Number of consumer calls	41,963	44,318	42,000	42,000
Options Counselling cases	5,254	4,605	5,200	5,200
Long Term Care applications	2,738	2,578	2,700	2,700
Long Term Care enrollments	2,236	2,404	2,300	2,300
Elder Abuse cases	973	1013	1,100	1,100

How We Do It: Program Budget Summary				
Category	**2017 Actual**	**2018 Actual**	**2019 Budget**	**2020 Budget**	**2020/2019 Variance**
Expenditures	$8,324,601	$9,270,743	$10,030,968	$10,112,830	$81,862
Revenues	$8,444,188	$8,974,758	$8,994,883	$9,072,297	$77,414
Tax Levy	($119,587)	$295,985	$1,036,085	$1,040,533	$4,448
FTE Positions	60.9	61.2	63.6	60.4	(3.2)

How Well We Do It: Performance Measures				
Performance Measure	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
100% Time reporting Medicaid match	43.4%	53.1%	39.5%	50.0%
Average time in phone queue (minutes)	5.95	4.08	5.00	5.00

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 primarily supported through State grants and Medicaid reimbursement funds. In 2020, major revenue changes include an increase in the Federal time reporting reimbursement of $61,000 and Dementia funding of $20,000.

To enhance support of individuals living with Alzheimer's and Dementia, the Department utilizes the partnership memory café model. The memory café model is a partnership with area businesses, 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 organizations to increase the reach of Dementia resources.

- Due to a high volume of turnover in the Resource Center, efforts continue to focus on staff retention and development. Salaries and wages reflect increases to create equity within the Resource Center to bring staff closer to current market rates.
- In 2019, a collaborative effort initiated with Waukesha County provides on-going training in the areas of Domestic Violence in Later Life and Dementia Care to community professionals including social workers, law enforcement, home care staff, and others. In 2020, expansion of this event includes a two-day seminar with additional breakout session opportunities and increases the number of continuing education units.

  Contractual services and commodities net increase of $36,861 includes $22,875 in outreach efforts through advertising and $13,966 in conference expenses to enhance staff retention and development and to promote Department on Aging services at a World Elder Abuse Awareness Day event.

To better align staffing with workflow, one position of an Administrative Assistant is transferred from the Aging Resource Center to the Area Agency on Aging.

Strategic Program Area 3: Area Agency

Service Provision: Mandated

Strategic Outcome: Quality of Life

What We Do: Activity Data				
Activity	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Legal assistance: consultation hours	10,945	7,390	11,000	10,000
Legal assistance: seniors served	1,256	1,199	1,250	1,250
Transit/van rides provided to seniors	89,910	92,729	93,000	93,000
Alzheimer's Counseling and Community Support: # of information and referral	615	612	500	500
# of "Memories in the Making" session interactions	1,670	1,280	1,000	1,000
Evidence Based Prevention (EBP) program participants	572	610	670	700
Number of people trained in the EBP leadership initiative	21	37	25	26
Number of individuals reached through one-on-one outreach	NA	1,789	1,900	2,000
Number of people reached through community outreach	10,650	10,822	10,850	11,000
Number of Telephone Reassurance calls	24,219	15,302	11,000	15,300

How We Do It: Program Budget Summary					
Category	**2017 Actual**	**2018 Actual**	**2019 Budget**	**2020 Budget**	**2020/2019 Variance**
Expenditures	$3,775,071	$3,654,645	$3,896,946	$4,076,240	$179,294
Revenues	$4,343,750	$4,435,085	$3,755,580	$3,911,248	$155,668
Tax Levy	($568,679)	($780,440)	$141,366	$164,992	$23,626
FTE Positions	5.0	3.8	3.9	3.9	0.0

How Well We Do It: Performance Measures				
Performance Measure	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Number of contracts that meet total assessment and monitoring	100%	65%	100%	100%
Percentage of survey customers who learn something useful about MCDA services at a community presentation	NA	87%	90%	90%
Percentage of Evidence-Based Prevention Program (EBPP) participants who rate a Class as "Excellent" or "Good"	NA	NA	90%	90%

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 of service contracts with home and community-based agencies to provide a comprehensive network of programs designed to allow seniors to live independently and with dignity. Some of the available community-based support includes caregiver support, neighborhood outreach, telephone reassurance services, transportation services, and late-life counseling. MCDA provides advocacy services through legal assistance programs and outreach to seniors.

Strategic Implementation: In 2020, contracted services increases by $138,000. The increase is distributed among a variety of contractual services offered to Milwaukee County seniors including $20,000 in senior center management, $90,747 in Alzheimer's direct services, $135,037 in Family Caregiver Support services, $9,162 in telephone reassurance, $24,374 in legal services, and $20,000 in transportation services. A realignment of $133,228 in home delivered meal services to program area 4, and a decrease of $32,284 in senior employment services together partially offset contract increases.

Revenues reflect a net increase of $156,000 including increases totaling $180,000 in Older Americans Act revenues. These increases are primarily driven by increases in Title III-B funds of $102,000 and Title III-E funds of $78,000. A decrease in reallocation of Base County Allocation funds of $215,562 offsets increases in Title III Area Agency Administration grant of $29,338 and the Alzheimer's Family Caregiver Support grant of $136,515.

The Milwaukee County 2019-2021 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 2020 include:

- Expanding advocacy opportunities and initiatives, including the expansion of the Department's Senior Statesman Program
- Enhancing family caregiver support services through increased outreach and through convening a family caregiver summit
- Improving services to people with dementia through community events and targeted outreach to underserved populations
- Expanding options within the Department's Evidence-Based Prevention Programs to address health disparities in underserved populations
- Improving and enhancing transportation services to seniors by providing rides to grocery stores, senior centers, meal sites and doctor's appointments
- Expanding and improving social programming at various senior centers throughout Milwaukee County

MCDA will also continue its collaboration with the Department of Administrative Services (DAS) and the Commission on Aging Service Delivery Committee to improve its contracting processes and outcomes. DAS staff will continue to work with MCDA Program Coordinators to expand vendor competition for services and clarify performance measures and performance outcomes for each contract.

To better align staffing with workflow, one position of an Administrative Assistant is transferred to the Area Agency on Aging from the Aging Resource Center.

Strategic Program Area 4: Senior Meal Program

Service Provision: Mandated

Strategic Outcome: Quality of Life

What We Do: Activity Data				
Activity	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
New Home Delivered meal applications (intake)	1,208	1237	1,250	1275
Number of congregate meal sites*	23	24	26	26
Meals served at meal sites	245,294	232,991	230,000	240,000
Home delivered meals	369,071	366,205	400,000	400,000
Number of volunteer hours reported	47,452	46,141	45,000	43,000

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

How We Do It: Program Budget Summary				
Category	**2017 Actual**	**2018 Actual**	**2019 Budget**	**2020 Budget**	**2020/2019 Variance**
Expenditures	$5,055,414	$5,081,936	$5,009,281	$5,186,789	$177,508
Revenues	$4,314,384	$4,393,321	$4,756,322	$5,020,528	$264,206
Tax Levy	$741,031	$688,615	$252,959	$166,261	($86,698)
FTE Positions	4.00	2.9	2.9	2.9	0.00

How Well We Do It: Performance Measures				
Performance Measure	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Cost per meal	$8.25	$8.48	8.58	8.58
Percentage of congregate diners reporting satisfaction	86%	91%	90%	90%
Percentage of Home Delivered diners reporting satisfaction	94%	92%	92%	92%

Strategic Overview: The Department on Aging provides nutritiously 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 dining sites throughout the County.

Strategic Implementation: In 2020, revenue increases by $259,000 through a combination of increases in Title III funds of $219,411, Nutrition Services Incentive Program (NSIP) funds of $27,000, and application of Base County Allocation funds (BCA) of $76,000. These revenue increases are offset by increases in expenses of $177,396, mostly to fund increased nutrition services to seniors primarily in minority intensive zip codes, such as 53206 and 53204. Additionally, there is a re-alignment of expenses for home delivered meals from Program Area 3 to better reflect changes in grant funding.

The Department will continue to see efficiencies in the catering contract executed in 2018. It is anticipated that this will save the Department approximately $71,000 in food expenses over the prior budget.

For the first time in several years, the number of home delivered meals declined marginally in 2018. Participants are

being assessed more frequently to see if they are still in need of the service or whether they can transition back into the community and participate in the congregate meal program. This has helped further contain growth of meal costs.

In 2020, the Department will continue to utilize the following initiatives that enable more robust nutrition program management:

- Using the State Bureau of Aging and Disability Resource Center's standardized meal cost calculator for effective fiscal management of the meal program provides better alignment of revenues and expenses, accurate Medicaid meal reimbursements pricing, and efficient vendor management.
- Presenting monthly invoices to all meals on wheels participants to increase awareness of the true cost of their meals. Though no eligible participant is denied a meal if they cannot afford to contribute, we are optimistic others will be more generous knowing this program is helping them age in place at a much more reasonable cost than assisted living or long-term care placement.
- Continuing to seek out new opportunities to host dining sites and possibly relocate or combine some sites to a new location, offering more amenities and or more flexible serving times. Most congregate sites serve meals at 11:30 am, however, there is increased demand amongst seniors wanting options when to eat, such as a breakfast and or dinner meal. In June of 2018, a pilot program known as Dine at Five, opened at the Elks providing a supper meal once a month, attracting over 140 diners. A similar increase is anticipated in 2020.
- Finding underserved populations. In 2019, two new meal sites opened, one at the Muslim Community Health Center and another at Greater Galilee Community Center. Both locations are open two days a week and serve approximately 50 participants per day. It is estimated that between these two sites, 10,000 additional meals will be served both in 2019 and 2020.
- Increasing meal reimbursement revenue by reaching more seniors in the County. In 2019, a contract with Community Care has enabled sale of additional home delivered meals to its participants. A related conservative revenue projection of $12,000 is included in the 2020 Budget.

Strategic Program Area 5: Senior Centers

Service Provision: **Discretionary**

Strategic Outcome: **Quality of Life**

What We Do: Activity Data				
Activity	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Members served	6,437	4,428	7,000	7,000
Recreational Activities: Number of Participants				
Exercise	55,814	52,185	60,000	60,000
Nutrition	5,388	7,061	5,500	7,500
Arts/ crafts	20,631	18,371	19,000	19,000
Special events	2,897	4,808	3,000	5,000
Education	10,295	10,570	10,400	10,700
Computer	10,371	9,287	10,000	10,000

How We Do It: Program Budget Summary				
Category	**2017 Actual**	**2018 Actual**	**2019 Budget**	**2020 Budget**	**2020/2019 Variance**
Expenditures	$1,455,068	$1,294,153	$1,294,388	$936,867	$357,251
Revenues	$4,493	$3,316	$0	$0	$0
Tax Levy	$1,450,575	$1,290,837	$1,294,388	$936,867	$357,521
FTE Positions	0.0	0.0	0.0	0.0	0.0

How Well We Do It: Performance Measures				
Performance Measure	**2017 Actual**	**2018 Actual**	**2019 Target**	**2020 Target**
Average Satisfaction Survey Score*				
Rose Senior Center	99.0%	98%	99.0%	99%
Kelly Senior Center	97.0%	96%	99.0%	99%
McGovern Senior Center	97.0%	87%	99.0%	99%
Washington Senior Center	95.0%	93%	99.0%	99%
Wilson Senior Center	99.0%	96%	99.0%	99%

* On average approximately 900 participant surveys are offered to older adults at the collective senior centers. Three survey questions are asked related to their health, sociability allowing them to combat isolation, and satisfaction in their lives because they come to the centers. The results are aggregated and presented above.

Strategic Overview: The Department uses tax levy funding for programs, services, and major maintenance at the five 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 some also serve as home-delivered meal dispatch sites. The centers also distribute federal commodity food boxes (Stock Box) through a collaboration with the Hunger Task Force.

Strategic Implementation: In 2020, facilities related services, such as utilities and maintenance, previously in the Department's budget transition to the Facilities Management Department. This transition reduces the Department's reliance on tax levy funding while enhancing its efforts in its core competency of senior center programming services. All five County owned senior centers will continue to be open five days a week.

Over the last two years, MCDA has worked with internal and external stakeholders to collect baseline senior center research that enables the community to begin thinking about the future of the Milwaukee County-owned senior centers. A recent report completed by the Wisconsin Policy Forum indicates that Milwaukee County has several key questions to address regarding the future of these centers. In partnership with other County departments and external community partners, MCDA is beginning to explore operational models that are fiscally sustainable.

MCDA also began partnering with the Milwaukee Public Schools (MPS) in 2018. The project, called Connecting Our Generations, brings older adults from Clinton Rose Senior Center together with grade school students at Brown St. Academy. MCDA hopes to expand this partnership in 2020 by adding more schools and senior centers to enhance intergenerational opportunities for both older adults and children.