

COUNTY OF MILWAUKEE
INTEROFFICE COMMUNICATION

DATE : June 12, 2013
TO : Fiscal and Budget Administrator
SUBJECT : Certification of Requested Expenditures, Revenue, Tax Levy and Positions

This is to certify that the 2014 requested budget as entered into BRASS and SBFS is the Department's requested expenditure appropriation and revenue projection necessary for the efficient operation of the Department. I certify that the requested budget, if adopted, would allow the Department to operate without requiring any additional funding and that all revenue estimates are reasonable and achievable.

I also certify that the information submitted, including all supporting schedules, conforms to the instructions in Budget Procedure 4.02 of the Milwaukee County Administrative Manual; and that the documentation submitted adequately justifies the Department's budget request.

I also certify that the submitted budget narrative conforms to the specifications in the Budget Instructions.

I am requesting expenditures in the amount of	\$	<u>18,659,035</u>
I am estimating revenues in the amount of	\$	<u>17,220,639</u>
I am requesting Tax Levy in the amount of	\$	<u>1,438,396</u>
Our directed Tax Levy Target is	\$	<u>1,438,396</u>

I am also submitting the following attachments required of all departments by County Board resolution or ordinance:

- *5 & 10 Percent Reduction Plan (per Resolution 90-1052)*
- *Schedule of Lease Agreements - New and Existing Leases (per Resolution 94-614)*
- *Fleet Utilization Report*

Department Administrator's Signature


Stephanie Sue Stein

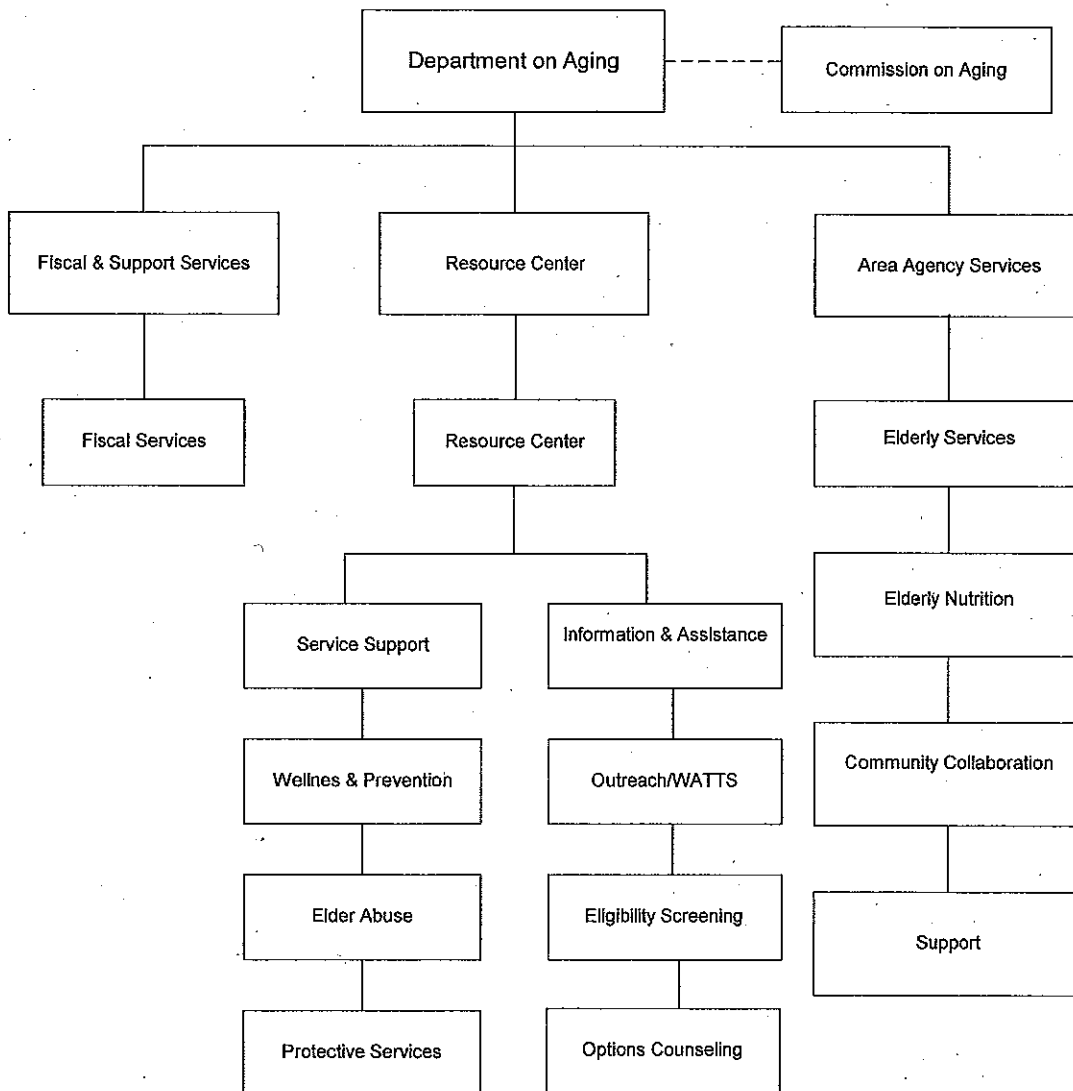
Department Name

Department on Aging

Department Organizational Unit #

790

DEPARTMENT ON AGING (7900)



MISSION

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

Budget Summary

	2014	2013/2014 Change
Expenditures	18,659,035	195,299
Revenue	17,220,639	159,559
Levy	1,438,396	35,740
FTE's	75.0	2.0

Major Programmatic Changes

- Collaborate with state and local partners to form a fundamental structure for Chapter 55 response capacity.
- Accomplish 2013-2015 Area Plan goals and objectives via the coordination and implementation of Home Chore and Repair, Community Engagement, Communications, and Underserved Populations work groups.
- Enhance targeted and coordinated outreach for promoting programs, services and opportunities for seniors.
- Establish shared prevention services with Disability Services Division to assist with reducing falls and increasing the management of chronic diseases.
- Collaborate with Behavioral Health Division in their redesign efforts to relocate clients to less restrictive community placements that meet their care needs.

OBJECTIVES

- Using the Eight Dimensions of Wellness as a guide, the MCDA Wellness Council will continue developing unique partnerships with aging organizations, public and private businesses, and special interest agencies to involve them in a campaign to educate, inform, and train the community on evidence-based prevention programs and healthy living practices for older adults. Emphasis for programming and education will be focused on chronic disease self-management, diabetes self-management, and fall prevention.
- Enhance current partnerships with American Red Cross, Wisconsin and Milwaukee County Emergency Management, local Fire and Police Departments, Department of Health Services Division of Quality Assurance and other local aging service organizations to engage them in conducting more community based presentations to assist with educating and preparing older adults and professionals from residential housing and assisted living and skilled nursing facilities on/for disasters.
- Continue to promote and highlight the significance of celebrating senior residents' contributions to Milwaukee County communities through the Senior Hall of Fame, Senior Statesman, Nutrition Volunteer Recognition, and Golden Idol to gain the continuous support of the existing and new community partners.
- MCDA will continue to adopt practices related to creating efficiencies around using paperless systems of communication.
- Realign staff to progress toward electronic use and retention of records and files.
- Improve accuracy of Medicaid reimbursement reporting to ensure continued levels of State funding support.
- In collaboration with state and community partners, increase staff training opportunities to provide high quality services in the areas of options counseling and urgent services.

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- In partnership with the Department of Health and Human Services and the Milwaukee County Aging and Disabilities Governance Board, MCDA will continue to advocate for the design and establishment of a user-friendly outside entrance with appropriate and clear building signage where older adults will have easy, safe and adequate accessibility to the MCDA Aging Resource Center, Commission on Aging meetings and other committee and work group meetings.
- To ensure success of the Active Aging Research Center Technology Grant Project, MCDA will work with the University of Wisconsin – School of Engineering – Active Aging Research Center, Wisconsin Institute on Healthy Aging, Wisconsin Bureau of Aging and Disability Resources and the Waukesha and Richland Counties Aging and Disability Resource Centers to involve and garner the input of Milwaukee County older adults and organizations serving the aging population.
- Utilize the Milwaukee County Face of Aging in Milwaukee County 2012 demographic report to educate the community about the importance of identifying, developing, and implementing services and programs that support the needs of seniors.
- Based on information published in the Milwaukee County Face of Aging in Milwaukee County 2012 demographic report, advocate for the recruitment and retention of an inclusive workforce within aging service provider agencies and other community partners.
- Coordinate opportunities for follow up discussions with the local seniors and aging network to ensure goals and strategies are appropriately implemented as written in the final 2013-2015 Area Plan.

DEPARTMENTAL PROGRAM DESCRIPTION

Milwaukee County Department on Aging, created in 1991, serves as Milwaukee County's designated Area Agency on Aging under the Older Americans Act and is 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.

The Department integrates multiple Federal and State revenue streams including the Older Americans Act, the Senior Community Services Program, Specialized Transportation Assistance Program for Counties (S85.21), Elder Abuse, Adult Protective Services, Base Community Aids (BCA), Family Care Resource Center Allocation, 100 percent Time Reporting, and available private matching grants and contributions.

The Commission on Aging is the County citizen agency, which consists of sixteen members representative of all segments of the Milwaukee County older adult population as appointed by the County Executive with approval of the County Board. The Commission functions as the lead organization responsible for the following: assessing major aging issues and needs concerning the population age 60 and older; reviewing the planning and service efforts of organizations and institutions in the county and its aging network; monitor State, Federal and local laws and regulations relating to the care and treatment of older adults; advocate for passage of legislation that meet the needs of older adults and make recommendations on issues relating to their well-being and functioning in order to enhance their ability to remain contributing members of the community. The Commission on Aging functions through three standing committees: Advocacy, Resource Center Oversight, and Service Delivery. The Commission and its standing committees are responsible for administering a comprehensive, coordinated human service system for community based services for County residents age 60 and older. This responsibility is supported by the Advisory Council, which establishes a permanent Intergenerational and Wellness Council. The Advisory Council is composed of 30 persons and the Intergenerational Council and Wellness Council include members who represent the diversity of Milwaukee County. MCDA serves as the administrative arm of the Commission on Aging.

The Department is the designated Aging Resource Center (ARC) for the older adult population in Milwaukee County under the State of Wisconsin's Family Care initiative.

The Milwaukee County Aging and Disability Resource Center (ADRC) Governing Board was created as the lead County agency required to perform specific functions related to the policies, operations and oversight of both the

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Aging Resource Center and the Disability Resource Center under Wisconsin State Statutes Chapter 46, serving persons age 60 or older and adults ages 18 to 59 with physical or developmental disabilities in need of long-term care. The ADRC Governing Board consists of seventeen (17) members representative of persons with physical and developmental disabilities and of the elderly as appointed by the County Executive with approval of the County Board.

The Department on Aging consists of three service areas:

Administration includes the Director's Office and the Fiscal and Support Services Division. The Director has overall responsibility for department operations, budget, community relations, new initiative development, community collaboration and acts as the liaison with elected officials at the local, state and federal government levels.

The major functions of the Fiscal and Support Services Division include budget development and management, accounting and personnel administration. The Division monitors departmental expenditures and revenues; reviews audits; reports service utilization and expenditures to County and State agencies; projects revenues and expenditures; and monitors compliance with funding source requirements. This Division also develops the Department's fiscal policies and assesses operations for effectiveness and efficiency.

Area Agency Services contracts for and monitors a comprehensive network of support services through community based agencies that assist older adults to remain independent in their homes. These programs are funded through the Older Americans Act and State revenue earmarked for elderly services. County tax levy funding is provided for program operation and maintenance of five county-owned senior center buildings. The Division is responsible for planning, research, and program development. In addition, unit staff solicits, monitors, evaluates and administers contracts for a variety of services in the community. Staff assists with contract development and coordinates the Request for Proposal process with other County departments.

The Area Agency Services Division provides staff support to the Milwaukee County Commission on Aging, its standing and ad hoc committees and the Advisory Council. Division staff assists the Commission in conducting public hearings and needs assessments as required under Federal statute, provides technical assistance and serves as a resource for businesses, universities and volunteer organizations interested in meeting the needs of older adults in the community.

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

The Aging Resource Center acts as the point of entry for Family Care and all other long-term care programs and is responsible for arranging short-term assistance for older adults with immediate or pressing needs. It is the primary source of quality information and assistive services on issues affecting persons 60 years of age and older and their family support networks.

As a major component of the State of Wisconsin Family Care initiative, this Division has six primary functions:

- 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;
- To provide pre-admission counseling to elders seeking residential placements;
- To determine eligibility for publicly funded and other long term care programs;
- To provide community education to older adults, their families, and caregivers on a broad range of subjects, including wellness and prevention of functional decline;

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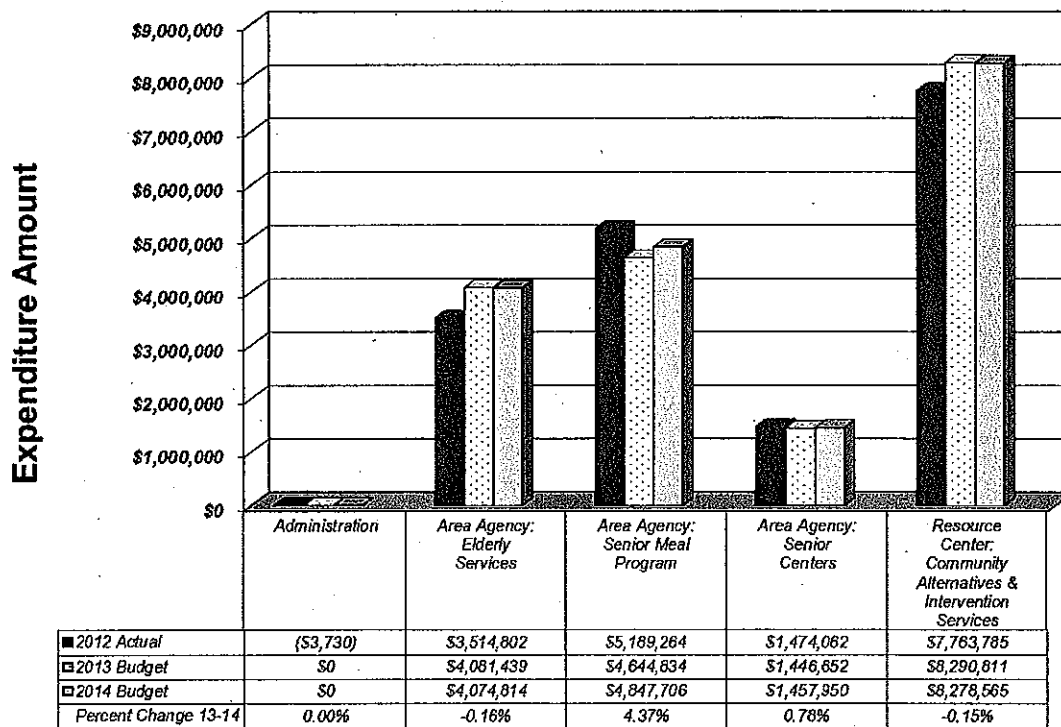
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- Provide options counseling for any resident age 60 and older; and
- Investigate allegations of elder abuse and provide protective services, guardianships and protective placement services to vulnerable older adults

Another integral function of the Resource Center is to coordinate daily with the State Income Maintenance staff (formerly Economic Support Division - Milwaukee County Department of Health and Human Services) to assure Medicaid eligibility compliance for persons choosing a publicly funded long term care option, including Family Care, Partnership, PACE and IRIS.

Expenditure Summary



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2014 BUDGET

Approach and Priorities

- Continue maximizing utilization of funding streams within funding regulations and maintaining program support integrity.
- Continue to sustain support of direct service level demands including senior center operations along with mandated services such as guardianships.
- Maintain support of congregate and home delivered meal programs and continue to promote actions that improve and protect the health and well-being of older adults through nutrition assistance programs.
- Continue support and expand wellness and prevention through input from seniors and enhancement of community collaborations.
- Continue providing excellent and efficient programs and services through working in cooperation with other government agencies and community partners.
- Continue to maintain support for growing demand for protection and well-being of victims and potential victims of abuse and neglect.

Programmatic Impacts

- Promote the health, safety and well-being of older adults while emphasizing prevention.
- Provide sufficient supports in fluctuating service demands, including family supports and meal programs.
- Continue to exam and assess service systems for capacity and gaps and forge collaborative relationships to develop program initiatives consistent with needs and gaps.

Budget Highlights

Staffing Adjustment

\$27,676

The creation of 1.0 FTE Management Assistant (Aging) position in the Resource Center reflects a personal service expenditure increase of \$55,352, partially offset by Resource Center time reporting reimbursement revenue at 50% of costs, resulting in a net salary and active fringe benefit expenditure increase of \$27,676.

Cooperative Services

\$0

The department continues collaborating, exploring and expanding work efforts and seeking more resources and revenue sources along with the Department of Health and Human Services (DHHS) for creating additional opportunities and efficiencies common to populations serviced by both departments.

Short-term Temporary - Direct Services and Purchase Contract Services

(\$240,000)

Based on demand and utilization, the department continues to administer and coordinate short-term client services through the Aging Resource Center in accordance to the State contract. Milwaukee County is responsible for court ordered corporate guardian services. Through enhanced monitoring over several years, Department on Aging Resource Center work efforts to eliminate errors and financial support of non-County petitioners ordering corporate guardians along with a decline in other temporary short-term service demand results in an expenditure decrease of \$250,000, from \$526,992 in 2013 to \$276,992 in 2014.

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An Area Agency purchase of service contract with SAGE reflects an expenditure increase of \$10,000 to \$20,000 in 2014. SAGE provides services in the Greater Milwaukee Area to older adults who are lesbian, gay, bi-sexual and transgender (LGBT), including social services, training to service providers, program information to LGBT older adults and families, friends and significant others, and increasing visibility among the greater community.

Senior Center Programs and Services

\$37,795

A new expenditure allocation of \$17,000 is reflected in a Facility Assessment Inspection crosscharge for evaluation of county-owned senior center facilities. Responses from seniors resulting from Area Plan public hearings indicate that seniors want more access to wellness-based programs and services. While in support of facility assessments and the major maintenance funding allocation remains unchanged for county-owned senior center facilities in 2014, Department on Aging is committed to providing a wholesome environment for expanding opportunities to help connect seniors to programs and resources that increase social interaction for which as a result has been determined to enhance senior well-being.

Expenditures reflect an increase of \$20,795 to properly align the budget and reflect experience based on actual services provided by the United Community Center (UCC) senior center program. The non-county owned community-based organization dedicated to serving the Hispanic community and Milwaukee County's near south side provides recreation, socialization, health prevention, education and social services to Hispanic adults, ages 60 years and older.

Evidence Based Prevention Program Management

(\$9,311)

The Department on Aging continues collaboration with the Commission on Aging Wellness Council and external partners to focus on sustainability and expansion of evidence-based prevention programs for Milwaukee County. Evaluations from Department on Aging evidence-based programs indicate that seniors participating in the programs felt better, gained specific knowledge and skills to prevent falls and learned how to manage their symptoms and take charge of their lives. A \$75,000 expenditure allocation in consultant fees is retained in 2014 to continue management and coordination of evidence based-prevention programs within senior centers and through other venues in Milwaukee County. Prevention related grant funding of \$84,311 for expanding Chronic Disease Self-Management and Long Term Care Sustainability for Falls Prevention is projected to continue in 2014.

Senior Center Fitness/Wellness Programs

\$0

A transfer of \$64,000 from a professional service contract in 2013 to a purchase of service contract in 2014 centralizes and consolidates day to day management and administration of fitness and wellness programs at county-owned senior centers under one purchase contract.

Older Americans Act and State Grant Revenue

\$85,976

The 2014 Older Americans Act federal grant funding reflects a decrease for aging programs and services based on 2013 state/county contract, reductions include \$4,021 in Title III-B Supportive Services, \$16,679 in Title III-C1 Congregate Meals, \$3,240 in Title III-C2 Home Delivered Meals, \$2,409 in Title III-D Disease Prevention and Health Promotion Services, \$2,157 in Title III-E Family Caregiver Support Program and \$11,116 in Area Agency on Aging Administration funds.

Other State grant funding decreases include \$12,000 in Active Aging project grant funds based on experience, \$806 in Base Community Aids grant and a \$33,548 decrease in state transportation funding from \$661,748 to \$628,200.

100% Time Reporting

\$112,292

Resource Center continues staff development and training efforts regarding accurate and timely staff reporting for eligible reimbursable Medicaid and Medicare services. Resource Center Time Reporting revenue reimbursement

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projects an increase of \$112,000 to partially offset eligible staff time expenditure increases totaling \$224,292 which directly relates to program service delivery.

Senior Meal Program

\$169,757

Long-term care member meal purchases continue in 2014 by the Department of Family Care through the Department on Aging Senior Meal Program for reimbursement of the full cost of meals provided. Program reimbursement revenue reflects an increase of \$85,003 based on experience primarily in home delivered meals, from a total of \$545,961 in 2013 to \$630,964 in 2014. Although program donations reflect a reduction of \$63,455, from \$663,455 to \$600,000 based on actual experience, 2014 donations include a slight increase of approximately 2% due primarily to enhanced efforts to promote participant contributions. Increases in program reimbursements offset by a decrease in donations reflect a net program revenue increase of \$21,548.

An expenditure increase of \$111,013 in Dietary Services functions as a direct pass-through cost from Behavioral Health Division for catering services and is associated with volume increase based on experience and meal rate increases. Other Food and Provisions reflect a \$20,000 increase based on experience. Senior Meal Program personal service costs reflect an increase of \$60,292 due to transfer of one filled Secretarial Assistant position from Area Agency – Elderly Services organizational unit whose workload is primarily meal program related. These meal program expenditure increases totaling \$191,305 also more than offset the net revenue increase of \$21,548 in program reimbursements and donations, resulting in a net expenditure increase of \$169,757.

Senior Meal Program			
	2012 Budget	2013 Budget	Change
Number of Meal Sites Open	29	29	0
Meals Served at Meal Sites	294,363	289,664	(4,699)
Home Delivered Meals	260,557	309,616	49,059
Total Meals Served	554,920	599,280	44,360

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BUDGET SUMMARY				
Account Summary	2012 Actual	2013 Budget	2014 Budget	2013/2014 Change
Personal Services (w/o EFB)	\$ 3,941,178	\$ 4,110,573	\$ 4,296,854	\$ 186,281
Employee Fringe Benefits (EFB)	2,903,447	3,196,364	3,342,148	145,784
Services	408,209	441,604	329,974	(111,630)
Commodities	1,180,945	1,168,944	1,190,261	21,317
Other Charges	6,736,784	6,924,039	6,768,834	(155,205)
Debt & Depreciation	0	0	0	0
Capital Outlay	130,450	100,000	100,000	0
Capital Contra	0	0	0	0
County Service Charges	4,001,673	3,609,380	3,729,926	120,546
Abatements	(1,307,270)	(1,087,168)	(1,098,962)	(11,794)
Total Expenditures	\$ 17,995,416	\$ 18,463,736	\$ 18,659,035	\$ 195,299
Direct Revenue	1,212,724	1,221,416	1,230,964	9,548
State & Federal Revenue	15,569,248	15,839,664	15,989,675	150,011
Indirect Revenue	0	0	0	0
Total Revenue	\$ 16,781,972	\$ 17,061,080	\$ 17,220,639	\$ 159,559
Direct Total Tax Levy	1,213,444	1,402,656	1,438,396	35,740

PERSONNEL SUMMARY				
	2012 Actual	2013 Budget	2014 Budget	2013/2014 Change
Position Equivalent (Funded)*	77.2	73.0	75.0	2.0
% of Gross Wages Funded	98.1	95.7	95.7	0
Overtime (Dollars)	\$ 45,445	\$ 19,056	\$ 12,060	\$ (6,996)
Overtime (Equivalent to Position)	0.0	0.4	0.2	(0.2)

PERSONNEL CHANGES						
Job Title/Classification	Title Code	Action	# of Positions	Total FTE	Division	Cost of Positions (Salary Only)
Management Assistant	Z0032	Create	1	1.00	Resource Center	\$ 35,038
					TOTAL	\$ 35,038

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ORGANIZATIONAL COST SUMMARY					
DIVISION		2012 Actual	2013 Budget	2014 Budget	2013/2014 Change
Administration	Expenditure	\$ (3,730)	\$ 0	\$ 0	\$ 0
	Revenue	0	0	0	0
	Tax Levy	\$ (3,730)	\$ 0	\$ 0	\$ 0
Area Agency: Elderly Services	Expenditure	\$ 3,514,802	\$ 4,081,439	\$ 4,074,814	\$ (6,625)
	Revenue	3,365,051	3,746,277	3,685,592	(60,685)
	Tax Levy	\$ 149,751	\$ 335,162	\$ 389,222	\$ 54,060
Area Agency: Senior Meal Program	Expenditure	\$ 5,189,264	\$ 4,644,834	\$ 4,847,706	\$ 202,872
	Revenue	4,630,638	4,685,344	4,686,973	1,629
	Tax Levy	\$ 558,626	\$ (40,510)	\$ 160,733	\$ 201,243
Area Agency: Senior Centers	Expenditure	\$ 1,474,062	\$ 1,446,652	\$ 1,457,950	\$ 11,298
	Revenue	0	0	0	0
	Tax Levy	\$ 1,474,062	\$ 1,446,652	\$ 1,457,950	\$ 11,298
Resource Center: Community Alternatives & Intervention Services	Expenditure	\$ 7,763,785	\$ 8,290,811	\$ 8,278,565	\$ (12,246)
	Revenue	8,760,554	8,629,459	8,848,074	218,615
	Tax Levy	\$ (996,769)	\$ (338,648)	\$ (569,509)	\$ (230,861)

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 severally liable to the county for the full amount paid. A county employee who knowingly violates this subsection may be removed for cause."