

District 5: Lane County

**SUMMARY OF PROPOSED
2011-12 Component
of the
AREA PLAN ON AGING & DISABILITY SERVICES
for
January 1, 2008 - December 31, 2012**

**For Progress Toward
A Comprehensive and
Coordinated Service System
for Seniors and People with Disabilities**

**Senior & Disabled Services,
a division of Lane Council of Governments**

(The Area Agency on Aging and Disability Services for Lane County, Oregon)
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Introduction

Overview of Senior & Disabled Services:

Lane Council of Governments (LCOG) is a voluntary association of general and special purpose governments in Lane County. The Council was formed in the mid-1940s to coordinate and provide intergovernmental and region-wide services. It is governed by a board of directors comprised of elected officials from twenty-eight (28) public agencies in the area. Among its many responsibilities, LCOG is the designated Area Agency on Aging and Disability Services for Lane County. Within LCOG, operational responsibility for services for senior citizens and people with disabilities rests with Senior & Disabled Services (S&DS) and two citizen advisory councils - the Senior Services Advisory Council and the Disability Services Advisory Council.

The mission of S&DS is:

To advocate for seniors and people with disabilities and provide to them quality services and information that promote dignity, independence, and choice.

S&DS currently provides a wide range of services to seniors and people with disabilities. S&DS employees provide many of these services; others are provided by organizations working under contract to S&DS.

Development of the Area Plan:

In accordance with federal and state policy, S&DS is required to help create and maintain a comprehensive and coordinated service delivery system to meet the needs of older and disabled people in Lane County. To document its work toward this goal, S&DS is required to develop a comprehensive Area Plan on Aging and Disability Services every four years, with annual updates. The Area Plan serves two purposes: (1) it is a planning document -- it identifies the needs of seniors and adults with disabilities, and describes the agency's plans for addressing these needs; and (2) it is a compliance document which provides the basis for the State of Oregon to contract with LCOG for the delivery of a range of services to older people and people with disabilities.

Annual Update of the Multi- Year Area Plan

Program Year 2011-12 (July 1, 2011 - June 30, 2012) represents the fourth full year of the Area Plan cycle which began in January 2008. Generally Area Plans are in effect for four years, with annual updates as needed. However, in January 2011 the State of Oregon Seniors and People with Disabilities division extended the current Area Plan timeframe by one year, to end December 31, 2012 instead of December 31, 2011. This decision was made based on budget and funding uncertainties at the State level. Thus, the creation of a new multi-year Area Plan document for Lane County has been postponed for one year. This 2011-12 Update to the 2008-12 Area Plan contains budget adjustments but does not represent significant service delivery changes.

The completion of a new multi-year Area Plan is a major undertaking for our agency. Activities are currently under way that will provide updated information and data on which to create the new 2013-2016 Area Plan. A comprehensive assessment of the needs of seniors and people with disabilities within Lane County is in draft form and has had a preliminary review by the Planning & Budget Committee. This information will be used as a basis for the 2013 Area Plan and the 2011 Needs Assessment will be presented to the Senior Services Advisory Council at a later date.

Information on the 2011-12 Annual Update

Consistent with LCOG's mission, S&DS seeks to coordinate services through collaboration with citizens and partners. The development of the 2011-12 Component to the 2008-2012 Area Plan was a joint effort involving staff and members of S&DS' Planning & Budget Committee, a standing committee of LCOG's two advisory councils. The Planning and Budget Committee plays an important role in the decision making process regarding use of these Older Americans Act funds.

The Committee met several times between November 2010 and March 2011. The following information was considered during the decision-making process for next year's budget:

- There were no funding increases anticipated for specific programs operated by Senior & Disabled Services. In fact, recently some programs for seniors, people with disabilities and low income households have not fared well at the Federal level and were actually reduced.
- Congress has been hotly debating funding for discretionary programs, of which the Federal Older Americans Act is one.

- The Federal Fiscal Year begins in October and runs through September of the following year. Because Congress chose to not pass a budget prior to October 1st, FY11 appropriations were allowed through what is called a “Continuing Resolution”.
- Because of this, S&DS used the latest information provided for 2009-11 as a basis for 2011-13 budget planning for our Older Americans Act programs.
- All contractors for S&DS are performing well and providing desired services and outcomes.
- The future of the Oregon Project Independence program is uncertain at this time. The Governor’s Balanced Budget for FY11-13 reduces OPI funding significantly over previous years.
- The aging of the population and interest in health care reform offer potential opportunities to research and explore new ways of providing or expanding services.
- Work activities related to the 2010-11 Objectives were reviewed.

In response to the above information Committee members agreed on the following:

- Given that the current array of services is stable and provides a variety of services, the 2011-12 Area Plan Budget should reflect the same array of services and providers.
- To the extent possible, funding for FY11-12 should be static. Funding levels will not include a COLA.
- Once the Needs Assessment is complete and the new Area Plan is drafted, the service array will be evaluated, gaps identified, and a review of current OAA services and contractors will be considered. A public hearing will be part of this process.
- Committee members agreed to meet at a later date to advise S&DS on issues related to the development of the 2013-16 Area Plan.

The recommended 2011-12 Area Plan Budget and Objectives are set out below.

Area Plan Budget for 2011-12

The budget set forth in this document focuses exclusively on the funds that S&DS receives from Oregon's Department of Human Services (DHS) via the Area Plan Contract. These funds are derived from three sources: Older Americans Act, Type B AAA Funds (including Medicaid, Food Stamps, and Oregon General Funds), and a State in-home services program known as Oregon Project Independence (OPI). Information on the permitted uses of these funds is presented below. This information is followed by specific budget information for 2011-12, including anticipated revenues and recommendations for the use of these funds for the delivery of services in Program Year 2011-12.

(Note: In addition to the funds identified in this document, each year S&DS receives and uses funds from a variety of other sources, including grants, contracts, fees, contributions from program participants, and donations. The agency has little decision-making control over the use of most of these revenues; they must be spent for the purposes prescribed by the funding sources and/or grantors.)

Permitted Uses of Area Plan Contract Funds:

OLDER AMERICANS ACT (Federal funds):

Title III-B: Support Services and AAA Administration, including:

1. Federal Priority Services:

- Access Services: transportation, including assisted transportation (a.k.a. escort); outreach; information and assistance; and case management;
- In-home Services: home care; personal care; friendly visiting; telephone reassurance; chore; coordination of in-home volunteers (a.k.a. ElderHelp); and in-home support services (such as, respite); and
- Legal Services

2. Other allowable services: Virtually all supportive services, other than meals, are allowable under OAA Title III-B. In addition to the federal priority services listed above, S&DS currently spends III-B funds on: AAA Administration, Money Management and support to the Long Term Care Ombudsman program.

Title III-C-1: Group Meals and AAA Administration.

Title III-C-2: Home-Delivered Meals (a.k.a. Meals on Wheels) and AAA Administration.

Title III-D: Health promotion, disease prevention and prescription medication services. Federal law requires that a minimum of 23.6% of OAA III-D funds be spent on medication services. S&DS currently uses its Title III-D funds for information, referral and counseling related to Medicare Part D, the Oregon Prescription Drug Program and other resources for prescription drug coverage.

Title III-E: Family Caregiver Support Services and AAA Administration. S&DS' current plan for the use of III-E funds calls for the provision of the following services to eligible individuals and families: information, assistance, caregiver training, counseling, organization of support groups, respite, and supplemental services.

Title VII-A: Elder abuse prevention services.

TYPE B AAA FUNDS (a blend of federal and State funds, including Medicaid, Food Stamps, and State funds):

These funds are utilized for eligibility determination, benefits issuance, case management, protective services, the licensure and monitoring of adult foster care homes, and AAA Administration. These funds may not be used for direct services.

OREGON PROJECT INDEPENDENCE, or OPI (State funds):

OPI can be used for the services listed below. Of these, S&DS currently funds: Home Care, Personal Care, Meals on Wheels, Case Management and AAA Administration.

- Home Care
- Personal Care
- Chore Services
- Information and Assistance
- Money Management
- Assisted Transportation/Escort Services
- Meals on Wheels
- Case Management
- AAA Administration

Revenues for 2011-12

Background

For most of its programs, Senior & Disabled Services receives funding on a bi-annual basis. Program Year 2011-12 will be the first year of the 2011-13 biennium.

- ***Older Americans Act Funds:*** Minimal funding changes, with a slight reduction, are projected for Fiscal Year 2011-12. This is the best case scenario. The 2011-12 Area Plan Budget was created using planning allocations released by the State of Oregon State Unit on Aging in the last quarter of the 2009-11 biennium.
- ***Oregon Project Independence:*** The State of Oregon Legislature has not yet completed its work on the Department of Human Services budget. Thus, the 2011-12 budget is based on the Governor's Balanced Budget proposal released in February 2011 which continued to call for a reduced funding level from previous years. Once the Legislature completes its work, changes may be required to the OPI budget.
- ***Type B Funds (a.k.a Medicaid and Food Stamps):*** Due to significant caseload growth, it is anticipated that funding to S&DS for Medicaid and Food Stamps may increase in 2011-13. However, this funding is also dependent on the decisions of the State Legislature. S&DS has determined to wait until more information is available to take any action related to staffing changes.

Estimated Revenues

Anticipated revenues for Program Year 2011-12 are displayed in the table below. In addition to showing the revenues that S&DS projects to be available for the upcoming year, the table provides comparative information based on the last year's approved budget.

REVENUE SOURCE	Revenue Comparison		Changes from 2009-10	
	Revenue FY 2010-11	Revenue FY 2011-12	\$	%
Older Americans Act	\$ 1,439,329	\$1,412,189	-\$27,140	-1.8%
Oregon Project Independence	\$388,702	\$368,256	-\$20,446	-5%
Type B AAA Funds	\$9,907,707	\$10,380,230	\$472,523	5%

Recommended Expenditures for 2011-12:

The proposed budget for 2011-12 is displayed in the table below.

Proposed Program Year 2011-12 Area Plan Budget

Program	FY08-09 Area Plan Budget: Approved	FY09-10 Area Plan Budget: Approved	FY10-11 Area Plan Budget: Amended	FY11-12 Area Plan Budget: Recommended
AAA Administration	\$185,070	\$173,339	\$ 167,311	\$154,523
LTC Ombudsman Support	1,285	1,285	1,333	1,333
OAA Info & Assistance	144,703	146,489	151,971	151,971
OAA Case Management	144,703	146,488	151,967	151,967
Family Caregiver Svcs(S&DS)	164,831	157,297	169,440	161,695
Medication Assistance	26,045	23,465	24,770	24,270
Rural Escort	12,026	9,853	10,222	10,222
Legal Services	59,677	59,677	61,909	61,909
Group Meals	334,156	407,738	423,011	407,687
Meals on Wheels (Red Cross)	127,216	114,456	130,812	113,092
Meals on Wheels (S&DS)	215,501	201,710	227,914	214,662
ElderHelp	15,868	15,868	16,461	16,461
Bill Payer / Money Mgmt.	5,670	7,843	8,136	8,136
Elder Abuse Prevention	11,871	4,992	7,615	5,151
OPI Case Management	154,876	120,855	71,751	83,993
OPI Home Care	274,289	218,637	142,994	118,740
OPI Personal Care	121,501	93,701	71,034	74,340
OPI Home Care Worker	8,400	11,604	6,666	6,134
OPI Info & Assistance	3,981			
OPI Contingency		\$34,617	\$34,617	
Caregiver Training (CHS)	2,099	1,999	2,055	2,055
Caregiver Support (CHS)	10,587	10,802	11,104	11,104
<i>Total OAA / OPI Services</i>	<i>\$2,034,356</i>	<i>\$1,862,090</i>	<i>\$1,865,629</i>	<i>\$1,780,445</i>
<i>Total Type B AAA Services</i>	<i>\$8,315,943</i>	<i>\$9,248,091</i>	<i>\$9,907,707</i>	<i>\$10,380,230</i>
ARRA Funds		\$99,502		
OPI Contingency		\$34,617		
GRAND TOTAL	\$10,350,299	\$11,244,300	\$11,773,336	\$12,160,675

Area Plan Objectives for 2011-12

The annual work program of the staff and advisors of S&DS includes a range of activities, most of which are prescribed by virtue of the agency's status as the Area Agency on Aging and Disability Services for Lane County. However, each year the division has some flexibility to undertake special studies and projects (a.k.a. objectives) directed at improving the lives of seniors and people with disabilities and/or enhancing the efficiency and effectiveness of the service delivery system. The 2010-11 Planning and Budget Committee of the Senior and Disability Services Advisory Councils recommended the following special projects, studies, and areas of focus which will continue for 2011-12:

1. In preparation for the new four year Area Plan that is required for 2013-16, complete an updated Needs Assessment, utilizing data from other sources to inform that process.
2. Work towards the sustaining two important grant projects within S&DS – the Mobility Management grant (in collaboration with LTD) and the Real Choices Systems Change grant (in collaboration with the State of Oregon, PeaceHealth, Lane Individual Practice Association(LIPA), Lane Independent Living Alliance (LILA), and other community partners).
3. Research opportunities to improve and expand services to seniors and people with disabilities through newly proposed health care initiatives and reform.
4. Pursue partnerships with other organizations and agencies to combine efforts towards common objectives to improve services for seniors and people with disabilities. This includes researching the potential for blending funds and services and integrating physical health, mental health and social service interventions to provide improved health outcomes and increased independence. Report back to the Senior Services and Disability Services Advisory Councils on the progress and findings.