

District 5: Lane County

**SUMMARY OF PROPOSED
2010-11 Component
of the
AREA PLAN ON AGING & DISABILITY SERVICES
for
January 1, 2008 - December 31, 2011**

**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)
1015 Willamette Street
Eugene, Oregon 97401
(541) 682-4038
www.sdslane.org

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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 Four Year Area Plan

Program Year 2010-11 (July 1, 2010 - June 30, 2011) represents the third full year of the Area Plan cycle which began in January 2008 and runs through December 2011. To

prepare for the comprehensive four-year plan, an assessment of the needs of seniors and people with disabilities who live in Lane County was completed by S&DS during the fall of 2006. Additionally, other studies of local needs, such as the United Way Community Assessment and the Lane Coordinated Public Transit Human Services Transportation Plan, were evaluated. The multi-year Area Plan for Seniors and People with Disabilities in Lane County was submitted to the State of Oregon in October 2007 and has received approval from the Department of Human Services State Unit on Aging.

Information on the 2010-11 Annual Update

Consistent with LCOG's mission, S&DS seeks to coordinate services through collaboration with citizens and partners. The development of the 2010-11 Component to the 2008-2011 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 and the Area Plan Objectives for each year.

The Committee met twice in January 2010 and considered the following information:

- FY 2010-11 is the second year of the FY 2009-11 bi-ennium. Federal Older Americans Act appropriations for FY10 reflect a very slight increase in a few funding streams. Most are close to FY09 levels. Thus, S&DS does not expect any significant increases as a result of the FY10 Older Americans Act approved appropriations.
- All contractors are performing well and providing desired services and outcomes.
- State funding for S&DS turned out to be more positive for 2009-11 than anticipated. However, the future of the Oregon Project Independence program is uncertain at this time, as DHS chose not to allocate for a full biennium but rather funded services only through June 2010. Thus, the OPI allocation for 2010-11 has not yet been determined.
- Recent direction from the Department of Human Services has clarified that a public hearing on the Area Plan for seniors and people with disabilities is only required every four years unless there is a significant proposed change to the services and supports provided.
- 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.
- Additionally, preparation for completion of the 2012-2015 Area Plan should begin this year, as it is an extensive and involved process. S&DS requested that the

Planning and Budget Committee offer policy direction regarding how to gather information on the needs of the community, complete a Needs Assessment, and prepare for the new four year Area Plan. Planning and Budget Committee members agreed to meet later this year to begin the planning process.

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 2010-11 Area Plan Budget should reflect minimal and equal funding increases for each of the current service providers, i.e. across-the-board increases of approximately 4%.
- The Planning and Budget Committee gave recommendations to S&DS regarding special initiatives or projects to focus on in the upcoming year. These are identified as the 2010-11 Area Plan Objectives.
- Committee members agreed to consider issues related to the Oregon Project Independence Program, once the status of the program is clear. Until then planning for the program will be status quo.
- Committee members also agreed to meet at a later date to advise S&DS on issues related to the development of the 2012-15 Area Plan.

The recommended 2010-11 Area Plan Budget and Objectives are set out below.

Area Plan Budget for 2010-11

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 2010-11, including anticipated revenues and recommendations for the use of these funds for the delivery of services in Program Year 2010-11.

(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

Note: The Oregon Legislature called for the Department of Human Services (DHS) to do a study to evaluate the Oregon Project Independence program for ways to find increased efficiency given the limited funds available. DHS completed the report and potential changes to the program will be considered in the upcoming year.

Revenues for 2010-11

Background

For most of its programs, Senior & Disabled Services receives funding on a bi-annual basis. Program Year 2010-11 is the second year of the 2009-11 biennium.

- ***Older Americans Act Funds:*** Minimal funding changes are anticipated for Fiscal Year 2010-11. The 2010-11 Area Plan Budget was created using the revenue estimates as approved at the beginning of the biennium, with an estimated 4% increase for this second year of the bi-ennium.

- ***Oregon Project Independence:*** The Department of Human Services has not yet approved an allocation for the second year of the 2009-11 bi-ennium. Thus, the Planning and Budget Committee determined the best course of action was to wait until more information was known to recommend funding changes. Thus, this budget reflects status-quo funding.
- ***Type B Funds (a.k.a Medicaid and Food Stamps):*** Due to significant caseload growth, funding to S&DS for Medicaid and Food Stamps has grown and allowed for an increase in staff positions to serve the public. The program is stable and the caseloads are growing at this time.

Estimated Revenues

Anticipated revenues for Program Year 2010-11 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 2009-10	Revenue FY 2010-11	\$	%
Older Americans Act	\$ 1,390,394 (includes ARRA)	\$ 1,439,329	\$48,935	3.5%
Oregon Project Independence	\$605,815	Status Quo budget at this time	\$0	0%
Type B AAA Funds	\$9,248,091	\$9,625,564	\$377,473	4%

Recommended Expenditures for 2009-10:

The proposed budget for 2009-10 is displayed in the table below.

Proposed Program Year 2009-10 Area Plan Budget

Program	FY 07-08 Area Plan Budget: Approved	FY08-09 Area Plan Budget: Approved	FY09-10 Area Plan Budget: Approved	FY10-11 Area Plan Budget: Recommend ed
AAA Administration	\$163,082	\$185,070	\$173,339	\$ 177,520
LTC Ombudsman Support	1,224	1,285	1,285	1,333
OAA Info & Assistance	124,089	144,703	146,489	151,971
OAA Case Management	125,248	144,703	146,488	151,967
Family Caregiver Svcs(S&DS)	147,978	164,831	157,297	161,695
Medication Assistance	24,897	26,045	23,465	24,423
Rural Escort	9,853	12,026	9,853	10,222
Legal Services	56,835	59,677	59,677	61,909
Group Meals	298,613	334,156	407,738	423,011
Meals on Wheels (Red Cross)	109,922	127,216	114,456	130,812
Meals on Wheels (S&DS)	188,029	215,501	201,710	227,914
ElderHelp	15,112	15,868	15,868	16,461
Bill Payer / Money Mgmt.	9,747	5,670	7,843	8,136
Elder Abuse Prevention	6,771	11,871	4,992	5,196
OPI Case Management	110,524	154,876	120,855	120,855
OPI Home Care	224,802	274,289	218,637	218,637
OPI Personal Care	96,108	121,501	93,701	93,701
OPI Home Care Worker	8,000	8,400	11,604	11,604
OPI Info & Assistance		3,981		
OPI Contingency			\$34,617	\$34,617
Caregiver Training (CHS)	1,999	2,099	1,999	2,055
Caregiver Support (CHS)	10,082	10,587	10,802	11,104
<i>Total OAA / OPI Services</i>	<i>1,685,933</i>	<i>\$2,034,356</i>	<i>\$1,862,090</i>	<i>\$2,010,526</i>
<i>Total Type B AAA Services</i>	<i>7,563,221</i>	<i>\$8,315,943</i>	<i>\$9,248,091</i>	<i>\$9,625,565</i>
<i>ARRA Funds</i>			\$99,502	
<i>OPI Contingency</i>			\$34,617	\$34,617
GRAND TOTAL	\$9,249,154	\$10,350,299	\$11,244,300	\$11,670,708

Area Plan Objectives for 2010-11

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 recommend the following special projects, studies, and areas of focus for

2010-11:

1. In preparation for the new four year Area Plan that is required for 2012-15, research options and methods for gathering information on the problems and needs of seniors and people with disabilities in Lane County to complete an updated Needs Assessment, utilizing data from other sources to inform that process.
2. Work towards the successful implementation of two important new 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.