

Aging and Disability Services

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Aging and Disability Services

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Aging and Disability Services

Vision

By 2015, almost 150,000 county residents will be 60 or older, 22% of the county population in that year.

- Most of these seniors will be living independently and leading active lives.
- Twelve percent of the older population will be paying for Long Term Care, or will receive care from friends or family to assist with activities of daily living. They may need some minimal help in identifying needs and/or resources.
- Twenty percent of the older population, who are very old and very frail, will have difficulties with activities of daily living, and will not have the family or resources needed to maintain independent living. They will receive Long Term Care services from the Aging and Disability Services system.

Multnomah County Aging and Disability Services Department (ADS) will remain the primary point of contact in the County for any senior or person with a disability in need of assistance. Through ADS, seniors and people with disabilities will have easy access to a wide range of social and health services, housing alternatives and support systems needed to continue to live safely and with dignity in the least restrictive living situation.

ADS will continue to promote and develop new services and housing options for both groups. ADS will manage local, state and federal public funds and programs to enhance and support individual and community efforts to keep elderly persons and people with disabilities at home and as independent as possible.

Partnerships between ADS and other public and private entities will build a network that will allow or assist ADS customers to choose services, providers or payment methods that best fit their individual needs. The service system will be broad enough to accommodate the needs of elderly persons of diverse backgrounds. ADS, consumers, senior and disability advocates and providers will work together to design programs, assess quality and consumer satisfaction and implement improvements.

ADS will continue its leadership role of planning with the community, providing up-to-date information and referrals, forming partnerships, regulating to ensure quality, and providing services such as case management, protective services and guardianship that emphasize public accountability.

Aging and Disability Services

Budget Overview	1996-97	1997-98	1997-98	1998-99	Difference
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Adopted</u>	
		<u>Estimate</u>	<u>Budget</u>	<u>Budget</u>	
Staffing FTE	193.68	339.40	345.30	354.40	9.10
Departmental Costs	\$17,570,946	\$26,233,916	\$25,495,958	\$27,936,521	\$2,440,563
Program Revenues	\$14,668,739	\$23,145,393	\$22,501,452	\$24,490,417	\$1,959,109
General Fund Support	\$2,902,207	\$3,088,523	\$2,994,506	\$3,446,104	\$481,454

Department Services

Aging and Disability Services offers the following services:

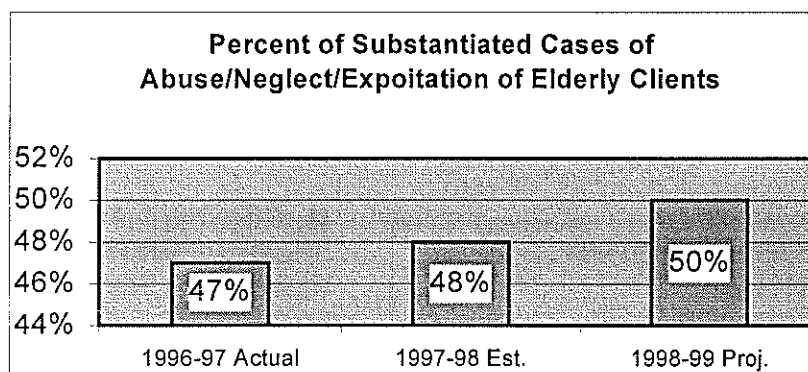
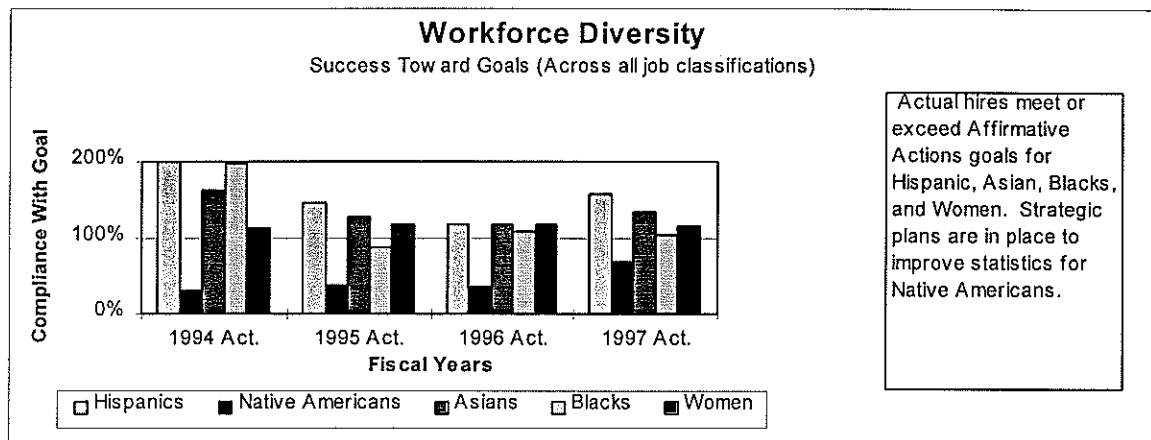
- Program development and advocacy
- Single entry/easy access to services through information and referral, gatekeepers and twenty-four hour phone help line
- Case management/need assessment, eligibility, case plan development and service monitoring for persons who are elderly and for persons with disabilities
- Adult care home regulation and licensing
- Public Guardianship/Conservatorship
- Protective services
- Minority services coordination
- Contract and service management
- District Centers
- Nutrition
- Transportation and special services
- In-home services
- Multi-disciplinary teams

Federal and State Medicaid policy, the Federal Older Americans Act, Oregon Project Independence statutes and agreements between Multnomah County and the City of Portland limit local policy discretion regarding services.

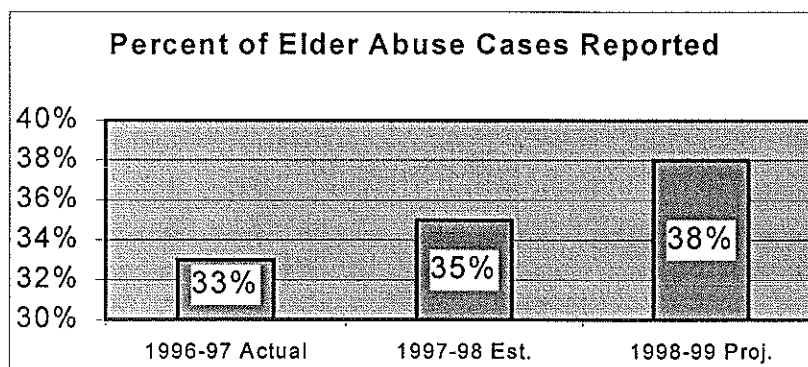
Elders in Action (a non-profit organization formerly constituted as the Portland/Multnomah Commission on Aging) provide advice and input on community needs, program and policy development and priorities for aging services. The Disability Services Advisory Council plays a similar role for the provision of disability services.

Aging and Disability Services

Performance Trends

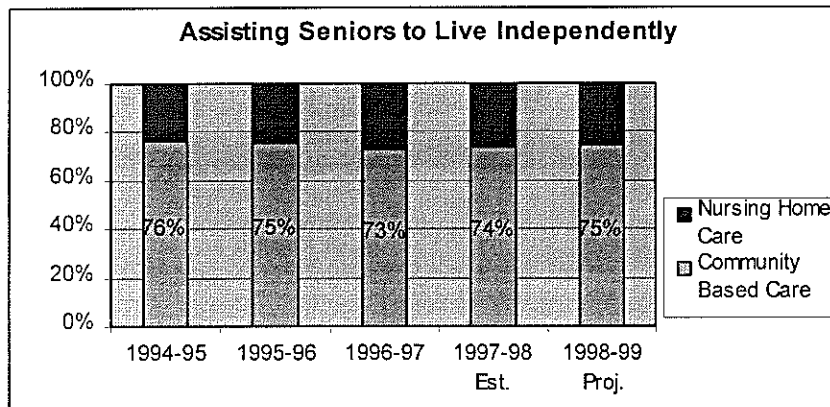


This trend compares substantiated abuse cases reported to Aging Services with all cases reported. Through an interagency agreement with the Multnomah County Sheriff's Office, Portland Police Bureau, and the cities of Gresham, Fairview, and Troutdale we are making progress in our ability to investigate and determine when abuse has occurred.

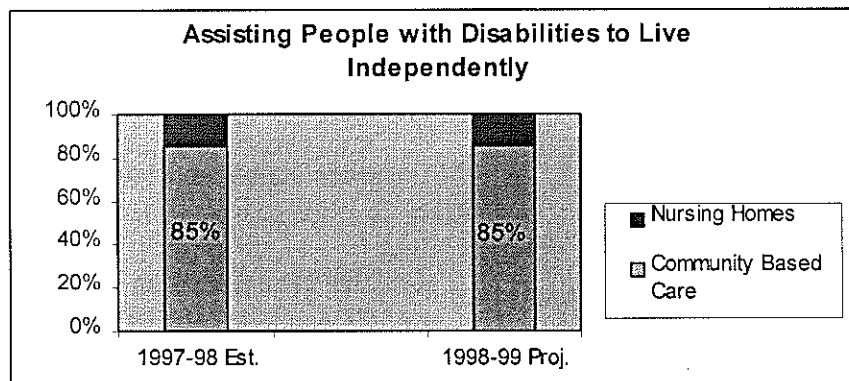


This trend compares the number of substantiated elder abuse cases to the rate (32 per 1000) which research studies project is the likely rate of elder abuse in Multnomah County. Based on national research, we are currently seeing about 1/3 of the elder abuse projected. Our goal is to improve both reporting and our ability to substantiate abuse cases.

Aging and Disability Services



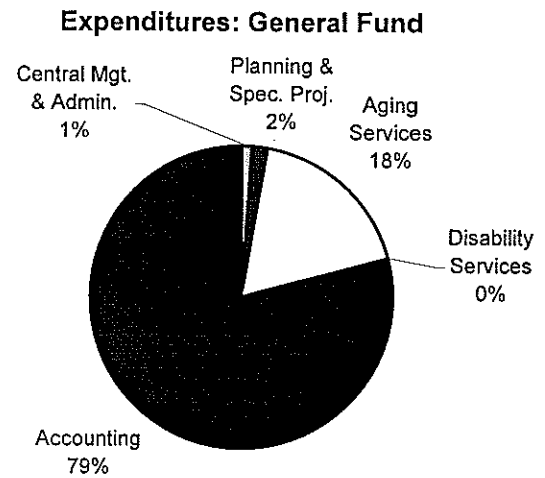
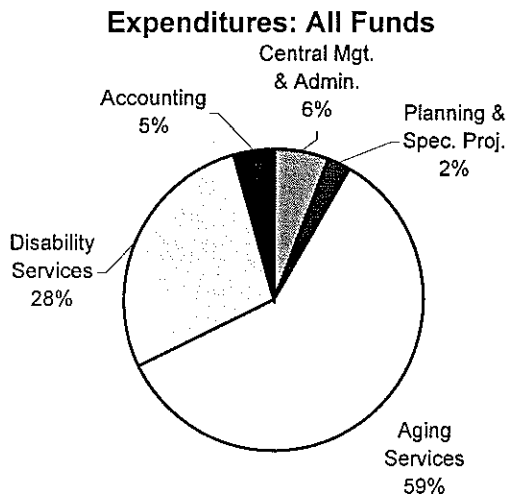
More than ¾ of elderly case managed clients are living in supportive environments other than nursing homes. Community based care in one's own home, an adult foster care home or other assisted care is responsive to client choice and less expensive than a nursing home.



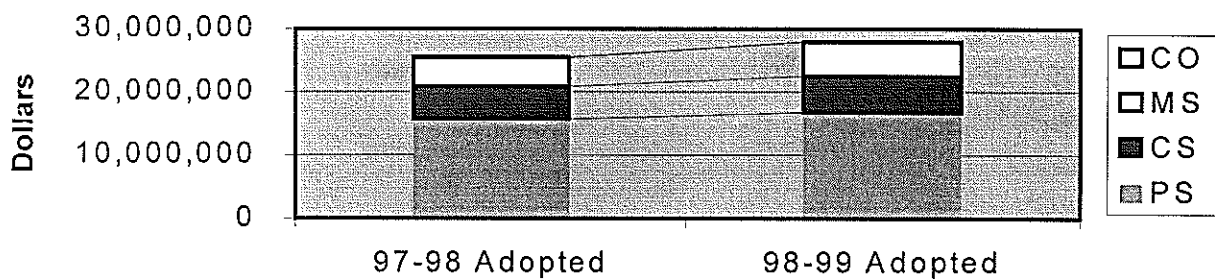
More than 5 out of 6 case managed clients with disabilities are living in supportive environments other than nursing facilities. Community based care includes help in one's home, residence in adult foster care, or other assisted care. This is responsive to client choice and is less expensive than nursing home care.

Aging and Disability Services

Expenditure Graphs



Budgeted Expenditures



Aging and Disability Services

Budget Trends

	1996-97 <u>Actual</u>	1997-98 Current <u>Estimate</u>	1997-98 Adopted <u>Budget</u>	1998-99 Adopted <u>Budget</u>	<u>Difference</u>
Staffing FTE	193.68	339.40	345.30	354.40	9.10
Personal Services	\$9,339,403	\$15,353,332	\$15,646,925	\$16,704,157	\$1,057,232
Contractual Services	\$4,816,230	\$5,592,998	\$5,212,312	\$5,740,872	528,560
Materials & Supplies	\$3,407,451	\$5,071,186	\$4,574,321	\$5,458,292	883,971
Capital Outlay	<u>\$7,862</u>	<u>\$216,400</u>	<u>\$62,400</u>	<u>\$33,200</u>	<u>(29,200)</u>
Total Costs	\$17,570,946	\$26,233,916	\$25,495,958	\$27,936,521	\$2,440,563
Program Revenues	\$14,668,739	\$23,145,393	\$22,501,452	\$24,490,417	\$1,959,109
General Fund Support	\$2,902,207	\$3,088,523	\$2,994,506	\$3,446,104	\$481,454

Costs by Division

	1996-97 <u>Actual</u>	1997-98 Current <u>Estimate</u>	1997-98 Adopted <u>Budget</u>	1998-99 Adopted <u>Budget</u>	<u>Difference</u>
Central Mgt & Admin.	\$1,405,431	\$1,681,183	\$1,570,571	\$1,617,699	\$47,128
Planning & Spec. Proj.	0	0	0	626,666	626,666
Aging Services	14,996,633	16,067,046	15,773,590	16,588,363	814,773
Disability Services	0	7,222,109	6,888,219	7,826,187	937,968
Accounting Transactio	<u>1,168,882</u>	<u>1,263,578</u>	<u>1,263,578</u>	<u>1,277,606</u>	<u>14,028</u>
Total Costs	\$17,570,946	\$26,233,916	\$25,495,958	\$27,936,521	\$2,440,563

Staffing by Division

	1996-97 <u>Actual</u>	1997-98 Current <u>Estimate</u>	1997-98 Adopted <u>Budget</u>	1998-99 Adopted <u>Budget</u>	<u>Difference</u>
Central Mgt & Admin.	15.44	18.30	18.30	20.30	2.00
Planning & Spec. Proj.	0.00	0.00	0.00	10.00	10.00
Aging Services	178.24	182.80	190.70	183.80	(6.90)
Disability Services	0.00	138.30	136.30	140.30	4.00
Accounting Transactio	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
Total Staffing FTE's	193.68	339.40	345.30	354.40	9.10

Aging and Disability Services

Issues and Opportunities

1. Expand the Employment Initiative Program for people with disabilities by increasing placement and job retention activities by adding a fourth team member.

Last year this program successfully employed 120 persons with disabilities who had been labeled as "unable to work." This initiative was supported as a state funded pilot project. The pilot worked so well that ADS was awarded permanent funding by the State of Oregon for three Employment Initiative Case Managers. The addition of the fourth staff member would provide one such position for each of the Disabilities Services branch offices and assure job retention activities for those employed through the program. Job retention activities include coordinating support groups for newly employed people and case manager follow-up with employers. A small job readiness fund would also be established providing one time help to prospective employees in buying required uniforms, work equipment, or paying license fees that would expedite job placement. Additionally the fund would allow for the use of contractors for specialized job coaching, facilitation or evaluation of client work related issues.

Board Action:

The Board recommended that ADS seek funding from the State legislature at its next session.

2. Establish an Emergency Housing Assistance Program for Elderly People and People with Disabilities

ADS is requesting \$190,000 for a Housing Specialist to assist older adults or persons with disabilities displaced from their residence and an emergency assistance fund.

The loss of affordable and accessible housing in Multnomah County for the elderly and persons with disabilities is a crisis. Rents have gone beyond the reach of low-income people and Federal housing subsidies are expiring forcing many vulnerable people to make emergency moves. The Housing Specialist position will assist people with disabilities and the elderly who are facing homelessness. Emergency funds will be used for security deposits, moving costs, rent assistance and other costs involved in relocating displaced individuals. The Housing Specialist will be a knowledgeable and compelling resource for county efforts to facilitate policy and advocate ADS clients.

Board Action:

Aging and Disability Services

Included in the adopted budget is \$190,000 for the Emergency Housing Assistance Fund.

1. Establish a Multi-disciplinary Team for the Disability Service Offices

ADS requested the addition of \$90,000 for a Multi-disciplinary Team (MDT) that would allow clients of the Disability Service Offices (DSO) to have enhanced services similar to those provided by the MDT at the Aging Services Offices. Multi-disciplinary Teams provide the expertise of nurses, social workers and other consultants to assure the best possible planning and service delivery for clients with complex care needs. Many individuals served by the DSO have multiple diagnoses that result in a combination of physical impairments, mental illness, developmental disability, and/or substance abuse issues. Outcomes of the MDT have included retention of housing for individuals at risk of eviction, improved mental and physical health by addressing multiple problems, and an economy of staff time.

Board Action:

Included in the adopted budget is \$65,000 to be phased in beginning October 1, 1998. Combined with a match from Medicaid, two positions and additional contract services have been budgeted.

Aging and Disability Services

Recent Accomplishments

- The transfer to ADS of the four Disability Services Offices (DSO's), with 135 staff, on July 1, 1997. A variety of committees consisting of staff and advocates from both Aging Services and Disability Services identified potential areas for service improvement but overall the merger was successful.
- Multi-Disciplinary Teams have been implemented on a limited basis to improve service delivery to DSO clients with complex needs. The teams, which are a collaborative effort with the Health Department and Community and Family Services, have been selected to receive increased general fund support because of their good service.
- Training has been developed to expand the Gatekeeper Program to serve people with disabilities.
- The After Hours Response and Helpline programs have been improved and expanded to include assistance to people with disabilities.
- The DSO's have been participating in an Employment Initiative Program in conjunction with the State's Senior and Disabled Services and Vocational Rehabilitation divisions. To date, 126 clients have found and retained employment for three months or more.
- Improved communication through a Department-wide newsletter called "News You Need" which is published monthly to update staff on issues, opportunities, and accomplishments.
- Started the new "Cherry Blossom" Senior Program and meal sites in the East Portland Community Center. This represents a significant public-private partnership between County ADS, City of Portland Bureau of Parks and Recreation, Loaves and Fishes, YWCA Senior Program, Asian Pacific American Senior Coalition, and the Mid-County Senior Center.
- Held a conference for minority populations to identify issues, concerns, and challenges facing the aging and disability populations and to explore innovative ways to improve resources and service delivery.
- Served as the host sponsoring agency for the Multnomah County - City of Portland Cultural Diversity Conference "The Heart of the Matter" designed to focus on the significant core values of recognition and respect for diversity.

Aging and Disability Services

Budget Highlights

- This budget is based on the continuation of the FY 98 service levels. Federal funding for Title XIX, Medicaid funds, is primarily based on caseload. The caseload for Aging Services is expected to be relatively stable, while there is expected to be a minor increase in the caseload for Disability Services.
- In response to the shrinking amount of low-income and special need housing, the County General Fund will contribute \$190,000 to the Emergency Housing Assistance Fund.
- Funding from the Federal Older Americans' Act for FY99 is expected to remain flat. These funds are used for support services such as case management, as well as congregate and home-delivered meals.
- Oregon Project Independence funding is expected to remain flat. These funds are used for in-home services and case management in the District Centers. However, final decisions regarding funding will not be known until the Oregon Legislature completes the state budget.
- Funding of \$25,000 from the City of Gresham, and \$1,500 from the Cities of Troutdale and Fairview are expected to support services delivered from the district center located in east Multnomah County. This helps to provide greater accessibility to those who live in that area.
- This budget includes an increase of 9.1 FTE over the current year budget. This change includes three positions in Disability Services for an employment initiative program. It also includes three human resource positions reflecting the County decision to reengineer the recruitment and selection functions of the Human Resources Division. The creation of a multi-disciplinary team in Disability Services added two positions. The Community Access Department added one Program Development Specialist dedicated to Housing issues.
- The budget includes the creation of a new Planning and Special Projects Division. Transferring those positions responsible for planning and special projects from other parts of the organization to a centralized work group created this new division. This will enable the Department to better anticipate and plan for the changes that are occurring in aging and disability programs.

Administrative & Support Services

Aging & Disability Services

Description

The mission of Administration and Support Services is to maintain and provide fiscal and management information and contract administration to enable Aging and Disability Services to plan and deliver social and health services. To accomplish this mission, Administration and Support Services assures financial accountability in a multiple fund account environment, administers and monitors service contracts, facilitates personnel and payroll activities and maintains local area computer networks and department computer programming.

Action Plan

- During FY 98-99 work on the integration between Aging and Disability will continue, including better preparation and training in the use of financial reports, contract administration and personnel functions. Work will start on the integration of the DSO branches in the County's area-wide information system.
- Participate with the State, other AAAs, health plans, national organizations, etc., to identify best practices in case management, and continue enhancements to the long-term care system, including the possibility of capitation.
- ADS will inform and advocate for programs for the elderly and persons with disabilities; especially those impacted by Federal welfare reform legislation.
- Continue the Implementation Plan resulting from the Departmental Quality assessment.
- Continue training and migration to the Microsoft Office suite software.

Significant Changes – Revenues

Transfer of funds between Title XIX and General Fund

Amount

\$631,360

Significant Changes – Expenditures

Transfer out Deputy Director to Aging Administration

FTEs

(1.00)

Amount

(\$92,340)

Transfer out 2.00 Program Dev. Specialist. to Planning & Spec. Projects.

(2.00)

(\$98,540)

Transfer in 2.00 Data Analysts from Aging Branches

2.00

\$104,801

Add new 1.00 Employee Specialist 2, 1.00 Office Asst. 2, and 1.00

3.00

\$106,321

Employee Specialist Sr. for HR reengineering.

Reclassify Data Analyst position to DS Administrator

\$19,893

Administrative & Support Services

Aging & Disability Services

Budget Trends

	1996-97	1997-98	1997-98	1998-99	
	<u>Actual</u>	<u>Current Estimate</u>	<u>Adopted Budget</u>	<u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	15.44	18.30	18.30	20.30	2.00
Personal Services	\$747,904	\$877,413	\$965,343	\$1,082,143	\$116,800
Contractual Services	341,105	376,640	328,563	131,421	(197,142)
Materials & Supplies	314,412	410,930	260,465	394,135	133,670
Capital Outlay	<u>2,010</u>	<u>16,200</u>	<u>16,200</u>	<u>10,000</u>	<u>(6,200)</u>
Total Costs	\$1,405,431	\$1,681,183	\$1,570,571	\$1,617,699	\$47,128
Program Revenues	\$701,358	\$883,879	\$825,725	\$1,437,085	\$611,360
General Fund Support	\$704,073	\$797,304	\$744,846	\$180,614	(\$564,232)

Costs by Program

	1996-97	1997-98	1998-99	
	<u>Actual</u>	<u>Adopted Budget</u>	<u>Adopted Budget</u>	<u>Difference</u>
Administration & Support Services	<u>\$1,405,431</u>	<u>\$1,570,571</u>	<u>\$1,617,699</u>	<u>\$47,128</u>
Total Costs	\$1,405,431	\$1,570,571	\$1,617,699	\$47,128

Staffing by Program

	1996-97	1997-98	1998-99	
	<u>Actual</u>	<u>Adopted Budget</u>	<u>Adopted Budget</u>	<u>Difference</u>
Administration & Support Services	<u>15.44</u>	<u>18.30</u>	<u>20.30</u>	<u>2.00</u>
Total Staffing FTE's	15.44	18.30	20.30	2.00

Planning & Special Projects

Aging & Disability Services

Description

This is a new organizational unit for the agency. There is a need to bring all the planning activities together to address the long range service, policy and program needs for both aging and disability services. It is crucial that the County, its service providers and the Department anticipate and help guide the changes that are occurring in these respective functions. At the present time, the Department's planning resources are being used to address more day to day operational issues. We need to look ahead to the challenges that face this system and develop strategies, policies and programs to improve the delivery of services to our aging and disability populations. This new work unit is being created without adding any new positions.

Action Plans

- Provide strategic planning around emerging issues and long-term health care models.
- Develop grants, resources, and special projects that build on the reputation of the organization for excellence and progressive, innovative approaches to management and service.
- Guide and advocate for public policy development that affects the community, family, health care and support service environment for older adults and persons with disabilities.
- Build on key results within the organization for quality programs, managing and improving its infrastructure and being a resource to the operating system.

Significant Changes – Revenue

Allocation of revenues for reorganized function

Amount

\$373,832

Significant Changes – Expenditures

Transfer in 2 Program. Dev. Specialists from Admin & Supp. Srv.

FTEs

2.00

Amount

\$98,540

Transfer in 3 Program. Dev. Specialists from AS: Comm. Access Services

3.00

\$169,126

Transfer in 2 Program. Dev. Specialists from AS: Branches

2.00

\$103,329

Transfer in 1 Program. Dev. Specialist from DS: Branches

1.00

\$56,824

Transfer in 1 Office Assistant 2 from AS: Comm. Access Srv.

1.00

\$30,738

Increase M&S and Contractual Srv and Capital.

\$101,849

Transfer in 1 Community Health Nurse from Comm. Access Srv. & Reclassify to CS Administrator

1.00

\$66,260

Planning & Special Projects

Aging & Disability Services

<u>Budget Trends</u>					
	1996-97 <u>Actual</u>	1997-98 <u>Current Estimate</u>	1997-98 <u>Adopted Budget</u>	1998-99 <u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	0.00	0.00	0.00	10.00	10.00
Personal Services	\$0	\$0	\$0	\$524,817	\$524,817
Contractual Services	0	0	0	10,000	10,000
Materials & Supplies	0	0	0	86,849	86,849
Capital Outlay	0	0	0	5,000	5,000
Total Costs	\$0	\$0	\$0	\$626,666	\$626,666
Program Revenues	\$0	\$0	\$0	\$373,832	\$373,832
General Fund Support	\$0	\$0	\$0	\$252,834	\$252,834
<u>Costs by Program</u>					
	1996-97 <u>Actual</u>	1997-98 <u>Adopted Budget</u>	1998-99 <u>Adopted Budget</u>	<u>Difference</u>	
Planning & Special Projects	\$0	\$0	\$626,666	\$626,666	
Total Costs	\$0	\$0	\$626,666	\$626,666	
<u>Staffing by Program</u>					
	1996-97 <u>Actual</u>	1997-98 <u>Adopted Budget</u>	1998-99 <u>Adopted Budget</u>	<u>Difference</u>	
Planning & Special Projects	0.00	0.00	10.00	10.00	
Total Staffing FTE's	0.00	0.00	10.00	10.00	

Description

The Aging Services Division is responsible for providing a full range of services to the elderly throughout Multnomah County. Included in these services are: single entry/easy access to timely information and referrals for case management/needs assessment, eligibility determination, and service monitoring for each elderly person who qualifies. Programs range from protective services for the elderly, nutrition services; in-home services for the housebound; transportation and other special services. The operation of multi-disciplinary teams, made up of health and social service professionals, has a proven success record of providing efficient and effective care. The division also licenses and regulates adult care homes and serves as a public guardian/conservator when necessary.

Primary sources of revenue for the Aging Services Division are provided by Federal and State Medicaid programs, the Federal Older Americans Act, the State of Oregon Project Independence and the Multnomah County General Fund.

Action Plans

- Improve the quality of case management services by streamlining procedures, developing care plans that allow monitoring for client outcomes and by developing standards for case management services.
- Improve public access for obtaining information and placement in an adult care home by making information available through the Internet and libraries.
- Developing protocols and standards will improve protective Services' response across disability and aging programs and by giving staff additional training and developing more user-friendly computer tracking systems.

Significant Changes – Revenues

	<u>Amount</u>
Allocation of resources for reorganized function	\$237,573
Increase in County support	\$521,598
Increase in Gen. Fund due to reallocation of local resources for Medicaid match	\$271,512

Significant Changes – Expenditures

	<u>FTEs</u>	<u>Amount</u>
Increase Contractual Srv		\$669,000
Reduction in Personal Srv. due to transfer of positions to other organizational units in the agency. Detail described on program pages.	(6.90)	(\$204,990)

Aging Services Division

Aging & Disability Services

Budget Trends

	1996-97	1997-98	1997-98	1998-99	
	<u>Actual</u>	<u>Current Estimate</u>	<u>Adopted Budget</u>	<u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	178.24	182.80	190.70	183.80	(6.90)
Personal Services	\$8,582,114	\$8,963,748	\$9,103,609	\$8,949,405	(\$154,204)
Contractual Services	4,466,818	5,163,803	4,731,194	5,489,713	758,519
Materials & Supplies	1,941,849	1,929,495	1,902,787	2,141,245	238,458
Capital Outlay	<u>5.852</u>	<u>10.000</u>	<u>36.000</u>	<u>8.000</u>	<u>(28.000)</u>
Total Costs	\$14,996,633	\$16,067,046	\$15,773,590	\$16,588,363	\$814,773
Program Revenues	\$12,816,252	\$13,791,655	\$13,539,758	\$13,640,707	\$100,949
General Fund Support	\$2,180,381	\$2,275,391	\$2,233,832	\$2,947,656	\$713,824

Costs by Program

	1996-97	1997-98	1998-99	
	<u>Actual</u>	<u>Adopted Budget</u>	<u>Adopted Budget</u>	<u>Difference</u>
Administration	\$0	\$0	\$237,573	\$237,573
Community Access Services	4,850,147	5,042,365	5,285,593	243,228
Branches and Nursing Facility	8,135,077	8,570,851	8,762,895	192,044
Public Guardian/Conservator	689,150	753,319	798,145	44,826
Adult Care Home Program	1,193,246	1,277,263	1,310,150	32,887
Multi-Disciplinary Teams	<u>129.013</u>	<u>129.792</u>	<u>194.007</u>	<u>64.215</u>
Total Costs	\$14,996,633	\$15,773,590	\$16,588,363	\$814,773

Staffing by Program

	1996-97	1997-98	1998-99	
	<u>Actual</u>	<u>Adopted Budget</u>	<u>Adopted Budget</u>	<u>Difference</u>
Administration	0.00	0.00	2.50	2.50
Community Access Services	13.18	13.50	9.50	(4.00)
Branches and Nursing Facility	138.44	149.00	143.60	(5.40)
Public Guardian/Conservator	9.15	9.70	9.70	0.00
Adult Care Home Program	15.50	16.50	16.50	0.00
Multi-Disciplinary Teams	<u>1.98</u>	<u>2.00</u>	<u>2.00</u>	<u>0.00</u>
Total Staffing FTE's	178.24	190.70	183.80	(6.90)

Aging Administration

Aging Services Division Aging & Disability Services

Description

The purpose of the Administration Program is to provide direction and coordination of the delivery of aging services to the elderly in Multnomah County. The mission of the Program is to ensure that quality services are provided through the management of existing programs and the development of new innovative programs. The program also advocates in the community for sufficient elder services and works to ensure that programs comply with all Federal, State and local regulations. This is a newly reorganized work group. In prior years, the function was included in the budget for Central Administration and Support Services.

Budget Overview

	1996-97 <u>Actual</u>	1997-98 <u>Adopted Budget</u>	1998-99 <u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	0.00	0.00	2.50	2.50
Program Costs	\$0	\$0	\$237,573	\$237,573

Key Results

	1994-95 <u>Actual</u>	1995-96 <u>Actual</u>	1996-97 <u>Actual</u>	1997-98 <u>Original Projection</u>	1997-98 <u>Current Estimate</u>	1998-99 <u>Projected</u>
Percent of Aging Services intakes processed within 45 days *Lower percent reflects more accurate data collection methods.	99.2%	NA	98%	86%*	86%	90%
Percent of trained client employed providers retained by ADS aging clients beyond 6 months *This is a new Key Result.	NA	NA	NA	NA	NA	78%*
Percent of contractors satisfied with contract and program management by ADS Branches and Business Services	NA	NA	85%	83%	85%	85%

Significant Changes – Expenditures

	<u>FTEs</u>	<u>Amount</u>
Transfer in Deputy Director from Admin. & Supp. Srv.	1.00	\$92,340
Transfer in Senior Office Asst. from Aging Branches	1.00	\$43,709
Transfer in Sen. Case Mgr. 2 from Aging Branches.	0.50	\$23,133

Multi-Disciplinary Team

Description

The purpose of the Multi-disciplinary Team (MDT) is to provide appropriate intervention for at-risk seniors who have a combination of social, mental health, health and alcohol/drug problems. Teams consist of a geriatric mental health specialist, social worker and community health nurse combine with Aging and Disability Services case managers through an agreement among Aging and Disability Services Department, Department of Community and Family Services, and the Health Department. Team members provide holistic assessments, case consultation, and direct nursing and mental health treatment as appropriate. These clients are often resistant to service, home maintenance or health care due to a combination of behavioral and health problems. These clients can represent a danger to themselves and the community.

Over 100,000 seniors reside in Multnomah County. Approximately 32% are considered frail and require assistance with daily living tasks. About 15% of older adults have a mental health or alcohol problem serious enough to require treatment. The team receives 750 referrals annually. These problems increase as the number of persons over age 75 grows.

Budget Overview

	1996-97	1997-98	1998-99	
	<u>Actual</u>	<u>Adopted Budget</u>	<u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	1.98	2.00	2.00	0.00
Program Costs	\$129,013	\$129,792	\$194,007	\$64,215

Key Results

	1994-95	1995-96	1996-97	1997-98	1997-98	1998-99
	<u>Actual</u>	<u>Actual</u>	<u>Actual</u>	<u>Original Projection</u>	<u>Current Estimate</u>	<u>Projected</u>
Improvement in living situation three months after MDT intervention	80%	76.8%	85%	75.4%	86%	86%

Significant Changes – Expenditures

	<u>Amount</u>
Increase in County Supp. to match Title XIX Medicaid	\$60,209

Community Access Services

Description

The mission of Community Access Services is to provide, through partnership with community agencies, an array of community-based supportive services that enable older persons to maintain the most independent lifestyle possible. To achieve this mission, Community Access Services provides the following programs:

- **Program Management & Advocacy** -- This program provides direction to and coordination of Community Access Services to insure quality services, program development and advocacy on issues affecting community elders. The group provides technical assistance and identification of unmet needs.
- **District Centers/Case Management** -- This program provides needs assessment and access to services for the elderly through contractual partnerships with neighborhood-based community agencies. Services provided include case management, information, and assistance. Cities throughout the County earmark funds for district centers.
- **Ethnic Services** -- The purpose of this program is to increase ethnic minority participation of clients, volunteers and employees of the Aging and Disability Services Department. This is accomplished through contracts for ethnic programs, development of specialized programs and multi-language materials, community outreach, translation, cultural and advocacy training and technical assistance to ethnic minority communities in forming and organizing self-supported organizations.
- **In-Home Services** -- The purpose of this program is to assist persons age 60 and older who require help with two or more activities of daily living to remain independent and live in their own homes. In-Home services provide assistance with activities of daily living which clients are unable to perform, or request assistance in performing.
- **Area-Wide Services** -- The purpose of this program is to assist older persons to continue to live as independently as possible. Activities include nutrition service (home-delivered and congregate meals); transportation services (scheduled door-to-door rides through taxis or special lift-equipped vehicles); special access services (24 hour Help Line for information and referral and community "gate keepers" to identify elders in need of assistance), and legal services and housing assistance.

Local discretion for the Community Access Program is limited by the Older Americans Act (Federal), Oregon Project Independence (State) and the City/County Intergovernmental Agreement.

Budget Overview

	1996-97	1997-98	1998-99	
	<u>Actual</u>	<u>Adopted</u>	<u>Adopted</u>	<u>Difference</u>
Staffing FTE	13.18	13.50	9.50	(4.00)
Program Costs	\$4,850,147	\$5,042,365	\$5,285,593	\$243,228

Community Access Services

Aging Services Division
Aging & Disability Services

<u>Key Results</u>	<u>1994-95 Actual</u>	<u>1995-96 Actual</u>	<u>1996-97 Actual</u>	<u>1997-98 Original Projection</u>	<u>1997-98 Current Estimate</u>	<u>1998-99 Projected</u>
Percent of clients served who are new	5.8%	8.7%	13%	6.8%	6.8%	7%
Percent of meal participants showing improvement in risk for malnutrition after 1 year	NA	NA	35%	42.8%	43%	44%
Percent of ethnic minority elders who are new clients	NA	NA	12%	10%	10%	10%
Percent of clients satisfied with Helpline response	NA	NA	85%	83%	83%	85%

Significant Changes – Expenditures

	<u>FTEs</u>	<u>Amount</u>
Increase Emergency Housing Assistance		\$90,000
Add 1.00 FTE Housing Development Specialist	1.00	\$50,786
Reduction in Personal Services reflecting transfer of positions to Planning and Special Projects	(5.00)	(\$251,158)

Branches & Nursing Facility

Aging Services Division Aging & Disability Services

Description

The mission of the Aging Branches and Nursing Facility Program is to provide services which are the least restrictive, least costly and in a safe environment of the client's choice to frail elders who are financially and service eligible. To achieve this mission, this Program provides case management to homebound and nursing home clients. The major responsibilities of this program group are: determine service and financial eligibility, authorize a range of services from community-based to nursing home care, monitor ongoing needs and service delivery and screen nursing home placements to ensure appropriate service use.

The Aging Services Division operates five Branches located conveniently for clients throughout Multnomah County. The Branches maintain a caseload of 2,500 financially eligible elders with services in their homes or in community-based care settings. Case managers located in the five Branches assess elderly individuals' particular needs and develop service plans for an array of community-based services.

The Nursing Facility program is located at the Mid-County Branch. This program provides case management services to approximately 1500 elderly persons no longer capable of independent living who are living in nursing homes. This program seeks, as appropriate, needed rehabilitation services or relocation of residents to less restrictive community-based care. The program assesses client need, determines service and financial eligibility and implements care plans based on service need and client choice.

Federal and state Medicaid regulation that defines eligibility and range of services available limit local discretion for this program group. State allocations and budgets are based on State caseload standards.

Budget Overview

	1996-97 Actual	1997-98 Adopted Budget	1998-99 Adopted Budget	Difference
Staffing FTE	138.44	149.00	143.60	(5.40)
Program Costs	\$8,135,077	\$8,570,851	\$8,762,895	\$192,044

Key Results

	1994-95 Actual	1995-96 Actual	1996-97 Actual	1997-98 Original Projection	1997-98 Current Estimate	1998-99 Projected
Percent of ADS Medicaid clients in community-based care: Aging Services	64.5%	65.4%	64.9%	64.9%	65%	66%
Percent of Medicaid clients residing in nursing homes: Aging Services	35.5%	34.6%	36%	35.1%	35%	34%
Percent of advocates satisfied with how ASD Branches support advocacy	NA	NA	87%	87%	88%	90%

Significant Changes - Expenditures

	FTEs	Amount
Transfer of 5.40 FTE to other divisions	(5.40)	(\$251,839)
Disbursement of Expenses from Administration		\$532,445

Public Guardian

Aging Services Division Aging & Disability Services

Description

The purpose of the Public Guardian/Conservator's Office is to obtain and implement court-appointed guardianship and/or conservatorship for individuals who are profoundly mentally incapacitated, unable to care for themselves, and are currently at high risk due to abuse, exploitation or extreme self-neglect. The service is available only to individuals without family or others able to serve in the role; most clients are also without financial resources. The Public Guardian's Office petitions the court for guardianship, coordinates contested cases with county counsel, and, once appointed, develops and implements care plans to reduce risk factors.

Services include medical and placement decisions, twenty-four hour service, fiduciary responsibility for client assets, property management and sale, and required court filings. The program also provides information and referral for Multnomah County residents and social service agencies related to guardianship and conservatorship, and provides off-hours consultant services for Aging Service Division's Senior Helpline.

Oregon Revised Statutes and county ordinances guide program activities for guardianship, conservatorship and for Public Guardians.

Budget Overview

	1996-97 <u>Actual</u>	1997-98 <u>Adopted Budget</u>	1998-99 <u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	9.15	9.70	9.70	0.00
Program Costs	\$689,150	\$753,319	\$798,145	\$44,826

Key Results

	1994-95 <u>Actual</u>	1995-96 <u>Actual</u>	1996-97 <u>Actual</u>	1997-98 <u>Original Projection</u>	1997-98 <u>Current Estimate</u>	1998-99 <u>Projected*</u>
Improvement in clients 180 days after court appointment	88.8%	100%	89.5%	100%	95%	95%
Annual accounts submitted within local court guidelines of 30 days after anniversary date	NA	NA	NA	NA	NA*	95%
*This is a new Key Result						

Significant Change - Expenditures

	<u>Amount</u>
Increase in Contract Services. due to reallocation of County Supp.	\$11,807
Increase in Mater. & Services. due to reallocation of building costs	\$22,664

Adult Care Home Program

Aging Services Division
Aging & Disability Services

Description

The purpose of the Adult Care Home Program is to assure a safe living environment with quality care for residents of adult care homes. The program is responsible for screening and inspecting applicant facilities for licensure, inspecting and issuing annual licenses, responding to complaints, and providing training for adult care home operators. The program also produces a listing of licensed homes for the use of the public.

Three thousand elderly and disabled persons requiring assistance with daily activities reside in and receive service from adult foster homes and room and board homes. There has been a steady increase in new homes licensed and a steady increase in complaints requiring investigation.

<u>Key Results</u>	<u>1994-95 Actual</u>	<u>1995-96 Actual</u>	<u>1996-97 Actual</u>	<u>1997-98 Original Projection</u>	<u>1997-98 Current Estimate</u>	<u>1998-99 Projected</u>
Percent of resident satisfaction with adult care homes	91%	84%	91%	90%	86%	90%
Percent of adult care homes with current license	98%	98.7%	96%	100%	96%	97%
Percent of homes with no substantiated claims of abuse, neglect, or exploitation	NA	75%	82%	89.5%	90%	90%

Budget Overview

	<u>1996-97 Actual</u>	<u>1997-98 Adopted Budget</u>	<u>1998-99 Adopted Budget</u>	<u>Difference</u>
Staffing FTE	15.50	16.50	16.50	0.00
Program Costs	\$1,193,246	\$1,277,263	\$1,310,150	\$32,887

Significant Changes - Expenditures

	<u>Amount</u>
Increase in Building Mgmt.	\$30,069

Description

The mission of Disability Services Division is to provide financial assistance and long term care services to people with disabilities. The Division administers Medicaid programs and Food Stamps to individuals under age 65 who have disabilities. The major responsibilities of this Division are to: determine financial and service eligibility, authorize a range of services from community-based to nursing home care, monitor ongoing needs and service delivery, screen nursing home placements to ensure appropriate service use, and relocate nursing home residents to the community when possible. Long-term care services are provided in the least costly setting that also promotes independence and client choice.

A major focus of this work group is to investigate complaints involving the physical or emotional abuse or neglect, or the financial exploitation of adults with disabilities.

Federal and State Medicaid and Food Stamp regulation limit local discretion for this program group.

Action Plans

- To continue implementation of the transfer and integrate work force into the County's structure and programs.
- To continue to improve services to individuals with disabilities.
- Continue efforts to assist interested clients and applicants to find and maintain employment.

Significant Changes - Revenue

Additional biennial Medicaid allocation from State. 51% of a 2 yr.
Allocation from the state.

Amount

\$733,000

Significant Changes - Expenditures

Full funding of vacant positions.

1.00 FTE for Administration. 1.00 FTE for Branches

2.00 FTE for Disability MDT

Corrections to Insurance Fund for Individual Staff

Bldg. Mgmt Increase

FTEs

Amount

\$90,900

2.00 \$100,000

2.00 \$65,000

\$134,243

\$346,053

Disability Services Division

Aging & Disability Services

Budget Trends

	1996-97 Actual	1997-98 Current Estimate	1997-98 Adopted Budget	1998-99 Adopted Budget	Difference
Staffing FTE	0.00	138.30	136.30	140.30	4.00
Personal Services	\$0	\$5,512,171	\$5,577,973	\$6,147,792	\$569,819
Contractual Services	0	36,837	136,837	109,738	(27,099)
Materials & Supplies	0	1,482,901	1,163,209	1,558,457	395,248
Capital Outlay	0	190,200	10,200	10,200	0
Total Costs	\$0	\$7,222,109	\$6,888,219	\$7,826,187	\$937,968
Program Revenues	\$0	\$7,222,109	\$6,888,219	\$7,761,187	\$872,968
General Fund Support	\$0	\$0	\$0	\$65,000	\$65,000

Costs by Program

	1996-97 Actual	1997-98 Adopted Budget	1998-99 Adopted Budget	Difference
Disability Services Administration	\$0	\$396,306	\$265,498	(\$130,808)
Branches	0	6,491,913	7,560,689	1,068,776
Total Costs	\$0	\$6,888,219	\$7,826,187	\$937,968

Staffing by Program

	1996-97 Actual	1997-98 Adopted Budget	1998-99 Adopted Budget	Difference
Disability Services Administration	0.00	3.00	4.00	1.00
Branches	0.00	133.30	136.30	3.00
Total Staffing FTE's	0.00	136.30	140.30	4.00

Disability Administration

Disability Services Division Aging & Disability Services

Description

The purpose of the Administration Program is to provide direction and coordination of the delivery of financial and long-term care services to people with disabilities by ensuring quality services, program development, advocacy and compliance with regulations. This Program optimizes the operation of the four branch offices through policy information dissemination, supervision, training, technical assistance and new program development. In addition, the Program provides staff support to the Disability Services Advisory Council.

Budget Overview

	1996-97 <u>Actual</u>	1997-98 <u>Adopted Budget</u>	1998-99 <u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	0.00	3.00	4.00	1.00
Program Costs	\$0	\$396,306	\$265,498	(\$130,808)

Key Results

	1995-96 <u>Actual</u>	1996-97 <u>Actual</u>	1997-98 <u>Original Projection</u>	1997-98 <u>Current Estimate*</u>	1998-99 <u>Projected</u>
Percent of case managed Medicaid Disability Services clients in community based care in nursing homes	NA	NA	NA	85%	85%
Percent of trained client employed Providers retained by Disability Services Clients beyond 6 months	NA	NA	NA	15%	15%
Number of Disability Services long-term care clients and risk intervention referrals in which a need was found, as compared with at-risk county residents age 18-65	NA	NA	NA	6%	10%
Percent of intakes processed within 45 days	NA	NA	NA	12%	13%
*These are new Key Results.	NA	NA	NA	86%	90%

Significant Changes - Expenditures

	<u>FTEs</u>	<u>Amount</u>
Transfer in of position from DSO Branch	1.00	\$47,238
Decrease in Indirect Costs due to reallocation to Branches		(\$175,000)

Disability Branches

Description

The purpose of the Disability Branches is to provide support and services to people with disabilities. The program serves 11,953 adults and children in the form of Medicaid programs and financial assistance. An additional 1,544 adults receive long-term care services in their homes or other community based settings. Another 208 adults and children receive nursing home services. Eligibility specialists and case managers in four Disability Branches located throughout the county deliver these services.

This program addresses the needs of financially and/or service-eligible people with disabilities under age 65. Individuals receiving home and community-based long-term care services are at risk of requiring more expensive, more restrictive nursing home care. Many individuals served have complex care needs, which may include a variety of physical, behavioral, and developmental disabilities. The creation of Multi-disciplinary teams allows the most appropriate care plan to be created. This team concept works well for the Aging Branches and will allow a key group of employees to provide direct services to clients.

The program is also responsible for investigating reports on abuse or neglect of adults under age 65 who have a disability, regardless of their eligibility for other programs provided by the Disability Branches. Additionally, the program assists interested clients and applicants in finding and maintaining employment. The goals of this effort are to increase the individual's independence and self-reliance, and to assure a stable income, while decreasing dependence on public assistance. Federal and State Medicaid and Food Stamp regulations that define eligibility and service availability limit local discretion for these programs. Budget allocations are based on state caseload standards.

Budget Overview

	1996-97 <u>Actual</u>	1997-98 <u>Adopted Budget</u>	1998-99 <u>Adopted Budget</u>	<u>Difference</u>
Staffing FTE	0.00	133.30	136.30	3.00
Program Costs	\$0	\$6,491,913	\$7,560,689	\$1,068,776

Key Results

	1994-95 <u>Actual</u>	1995-96 <u>Actual</u>	1996-97 <u>Actual</u>	1997-98 <u>Original Projection</u>	1997-98 <u>Current Estimate*</u>	1998-99 <u>Projected</u>
Percent of Disability clients successfully transitioned to stable income: General Assistance clients who are approved for SSI/SSDI at initial or reconsideration level	NA	NA	NA	NA	60%	62%
Clients served by Employment Initiative who remain employed beyond 3 months	NA	NA	NA	NA	60%	65%

*These are new Key Results.

Significant Changes – Expenditures

	<u>FTEs</u>	<u>Amount</u>
Increase in Personal Services due to full funding of vacant positions	1.00	\$350,000
Increase in Indirect Costs due to reallocation to Branches		\$134,243
Increase 2.00 for newly created MDT (Social Worker and Comm. Health Nurse.)	2.00	\$209,044
Increase in Building Management costs		\$346,053

Description

The County General Fund makes payments to the State of Oregon which the State uses to generate federal Title XIX entitlement revenues. This accounting transaction records the transfer of Title XIX matching funds to the General Fund. The specific program expenditures funded by these reimbursements are shown elsewhere in the Aging and Disability Services budget. The change in reimbursements is dependent on the amount of contribution to the State in other Aging and Disability Services programs, the cost of living adjustments allowed by the State and Federal governments and allocation decisions made at the State level.

Budget Overview

	1996-97	1997-98	1998-99	
	<u>Actual</u>	<u>Adopted</u>	<u>Adopted</u>	<u>Difference</u>
		<u>Budget</u>	<u>Budget</u>	
Staffing FTE	0.00	0.00	0.00	0.00
Program Costs	\$1,168,882	\$1,263,578	\$1,277,606	\$14,028

Significant Changes – Expenditures

No Significant Changes.