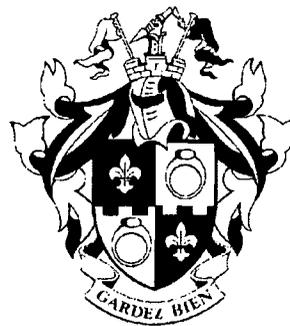


An Inventory of County Government Programs Designed to Serve Seniors



OFFICE OF LEGISLATIVE OVERSIGHT
REPORT NUMBER 2005-3

March 1, 2005

Scott A. Brown
Legislative Analyst

EXECUTIVE SUMMARY

The 2000 Census estimated that 98,000 or 11% of Montgomery County's residents are aged 65 years and older. By 2030, this cohort of County residents is expected to nearly double in size and account for at least 17% of the County's population.

During the past five years, multiple studies received by the Council echo the Census data predictions about the growth in the County's senior population. The different reports offer a variety of recommendations as to what the County Government should do to meet the current and future needs of its older residents.

This Office of Legislative Oversight (OLO) report adds new information to the portfolio of completed studies by compiling an inventory of County Government programs designed to serve seniors. It also estimates the total cost and revenues associated with the programs in the inventory.

OLO found that in FY 05, the Council appropriated an estimated \$32 million to support 31 programs designed to serve seniors. County funds constitute \$24 million or 75% of this amount. The funding pays for a diverse range of programs that fall within eight categories of services to seniors: protective/guardianship; in-home assistance; housing; nutrition; health-related; transportation; recreation, leisure, and continuing education; and fiscal, legal, and other support.

The \$32 million appropriated in FY 05 represents a 23% increase (\$5.9 million) from the amount spent in FY 03. Housing programs received the largest increase between FY 03 and FY 05.

Even though programs for County seniors are managed by nine different departments/offices, OLO found a reasonable system of program coordination. The County provides a primary point of contact and referral system (staffed by the Department of Health and Human Services); three formal coordination structures; and a regular information dissemination forum attended by program staff. To date, however, no strategic plan has been developed to position the inventory to meet the needs of a growing population of seniors.

OLO's recommendations aim to position the County Council and others to make fully informed resource allocation decisions about funding programs designed to serve seniors. In sum, OLO recommends the Council request a combination of Legislative and Executive Branch staff to complete the following tasks within the next year:

- An expansion of the inventory of programs designed to serve seniors to include programs offered by other public sector entities as well as those sponsored outside of the public sector by non-profit and private organizations; and
- An objective assessment of how well the completed inventory of public, non-profit, and private sector programs meets the existing and future needs of County's seniors.

OLO also recommends that the Council request the Chief Administrative Officer to present a report to the Council every other year, that: (1) updates the comprehensive inventory of programs designed to serve seniors; and (2) assesses the progress made toward meeting the needs of the County's seniors. Institutionalizing this type of reporting should help sustain a process of making comprehensive and needs-based resource allocation decisions about funding programs designed to serve the County's senior residents.

Office of Legislative Oversight Report 2005-3

INVENTORY OF COUNTY GOVERNMENT PROGRAMS DESIGNED TO SERVE SENIORS

I. Introduction..... 1

 A. Authority

 B. Scope, and Organization of Report

 C. Methodology

 D. Acknowledgements

II. Background 3

 A. Summary of Demographic Characteristics of Seniors..... 4

 B. Summary of Recent Studies Related to Seniors in Montgomery County..... 5

III. Selection and Categorization of Programs..... 11

IV. Inventory and Fiscal Analysis..... 14

 A. Overview of Expenditures and Revenues 15

 B. Funding by the Eight Categories of Services to Seniors..... 24

 C. Inventory of Programs Designed to Serve Seniors 28

V. Coordination, Performance Measures, and Strategic Planning Efforts 33

 A. Coordination of Programs 33

 B. Program Performance Measures 37

 C. Recent Strategic Planning Efforts 39

VI. Summary of Findings 43

VII. Recommendations..... 53

VIII. Agency Comments on Final Draft of Report..... 56

Appendix A: Inventory of County Government Programs Designed to Serve Seniors

AN INVENTORY OF COUNTY GOVERNMENT PROGRAMS DESIGNED TO SERVE SENIORS

LIST OF TABLES

TABLE NUMBER	TITLE	PAGE
1	Reports/Studies Related to Services to Seniors in Montgomery County, 2000-2004	3
2	Additional Seniors-Related Reports and Studies	10
3	Eight Categories of Services to Seniors	13
4	Estimated FY 05 County and Non-County Expenditures for Programs Designed to Serve Seniors by Department	17
5	Source, Amounts, and Programs Supported with Non-County Funds	20-21
6	Revenue Received by Programs Designed to Serve Seniors (FY 03-FY 05)	23
7	FY 03 to FY 05 Funding Changes for Programs Designed to Serve Seniors, by Category	27
8	The Inventory of County Government Programs Designed to Serve Seniors	28
9	Programs Designed to Serve Seniors that do (and do not) Participate in Montgomery Measures Up!	38
10	Programs that Experienced a Decrease in Funding: FY 03 – FY 05	41

LIST OF CHARTS

CHART NUMBER	TITLE	PAGE
1	Percent of FY 05 County and Non-County Funds for County Government Programs Designed to Serve Seniors	16
2	Distribution of FY 05 County and Non-County Funds for County Government Programs Designed to Serve Seniors by Department	16
3	FY 03 to FY 05 Changes in Expenditures for Programs Designed to Serve Seniors	18
4	Percent Distribution of FY 05 Funds Across Eight Categories of Services to Seniors	24

Chapter I. Authority, Scope, and Methodology

A. Authority

Council Resolution 15-710, FY 2005 Work Program of the Office of Legislative Oversight, adopted July 27, 2004.

B. Scope and Organization of Report

This report by the Office of Legislative Oversight (OLO) responds to the County Council's request to compile an inventory of all County Government programs designed to serve seniors, and to assess the adequacy of the planning and coordination among the different programs. The report addresses:

- The total cost and total revenues for the inventory of programs;
- How the various programs are coordinated with one another; and
- The strategic planning efforts for programs designed to serve seniors.

Seniors receive an array of County Government services. However, this study only includes those programs that have a clearly stated purpose of serving seniors. The inventory does not include general County Government services that are available to all County residents. In addition, the study does not include funding for capital projects.

This report is organized as follows:

Chapter II, Background, highlights the findings and recommendations of recent studies related to seniors, and also summarizes the demographic data contained in the studies.

Chapter III, Selection and Categorization of Programs, presents OLO's methodology of selecting and identifying the array of County Government programs designed to serve seniors. The chapter also presents and describes categories of services to seniors used in Chapter IV to examine the inventory of programs.

Chapter IV, Inventory and Fiscal Analysis, provides descriptive and fiscal information on the programs designed to serve seniors for fiscal years 2003, 2004, and 2005.

Chapter V, Coordination, Performance Measures, and Strategic Planning Efforts, describes the coordinating mechanisms used by County Government staff to coordinate programs; summarizes the performance measures currently collected and reported; highlights recent strategic planning efforts; and summarizes feedback from the field concerning the common challenges facing programs designed to serve seniors.

Chapters VI and Chapter VII present OLO's Findings and Recommendations; and **Chapter VIII** contains the formal written comments received on the final draft of the report.

C. Methodology

Scott Brown, Legislative Analyst conducted this study. Teri Busch, Administrative Specialist and Kristen Latham, Research Assistant, provided assistance with final production of the report.

OLO gathered information for this project in numerous ways including general research, document reviews, individual and group interviews, and on-site observations. OLO worked with Executive Branch staff from the Offices of the County Executive, the Office of Management and Budget, Department of Health and Human Services, Department of Public Works and Transportation, Department of Housing and Community Affairs, Department of Recreation, Montgomery County Public Libraries, Montgomery County Police Department, Montgomery County Fire and Rescue Services, the Office of the County Attorney, and the Montgomery County Volunteer and Community Service Center, to compile process, workload, budget, and other data. OLO also worked with members of the Commission on Aging.

D. Acknowledgements

The Office of Legislative Oversight thanks the many Executive Branch staff who contributed to this study. Compiling data across department lines is always challenging and this project was only possible because of the tremendous cooperation received from multiple program and budget staff from the departments/offices listed in Section C.

In particular, OLO greatly appreciates the time and valuable contributions made by Assistant Chief Administrative Officer, Parker Hamilton; Chief, Aging and Disability Services, Dr. John (Jay) Kenney; and Administrative Coordinator, Bill Clark. OLO also thanks central Council staff members Joan Planell, Essie McGuire, Aron Trombka, and Minna Davidson for the technical assistance provided throughout the project study period. In addition, OLO also thanks Pamela Zorich and Mary Goodman from M-NCPPC's Research Division for verifying the demographic data contained in this report.

Chapter II. Background

During the past five years, the Council has received a number of reports (listed below in Table 1) related to seniors. Various Council committees have reviewed several of the reports, which have contributed to the public policy debate concerning seniors.

Most of the studies report an unprecedented number of persons living to age 65 and beyond in the County. Further, the growth of this age cohort will increase exponentially as “baby boomers” reach retirement age. Several of the reports advocate that the County should better position itself to meet the unique needs of both frail seniors as well as healthy, active seniors.

Section A of this chapter summarizes the demographic information presented in the reports listed in Table 1¹; and Section B highlights the findings and recommendations from each report. Section C lists additional reports published since 1986 that relate to services for seniors in Montgomery County.

Table 1
Reports/Studies Related to Services to Seniors in Montgomery County
2000-2004

Title	Prepared by:	Date Issued
<i>Services for the Elderly in Montgomery County</i>	League of Women Voters (Maryland division)	June 2004
<i>A Call for Action on the Growth of Montgomery County's Aging Population (White Paper Report)</i>	Grass Roots Organization for the Well-Being of Seniors (GROWS)	January 2004
<i>FY 04 Area Plan Update</i>	Area Agency on Aging (within DHHS)	February 2004
<i>Strategic Planning Study</i>	DHHS' Aging and Disability Services	December 2002
<i>A Report on the Needs of Low Income Seniors – Montgomery County, Maryland</i>	DHHS' Aging and Disability Services	June 2002
<i>Transportation Services for Seniors and People with Disabilities</i>	Office of Legislative Oversight	March 2002
<i>Intensive Budget Review on Aging and Disability Services</i>	County Council Staff	January 2002
<i>Need for Housing for Older Adults in Montgomery County</i>	M-NCPPC	April 2001
<i>The Senior Initiative: Assuring that Montgomery County's Seniors Age with Dignity and Vitality</i>	Collaborative effort by multiple County departments and agencies	January 2001

Source: OLO, November 2004

¹OLO asked M-NCPPC's Research Division to verify (and update where necessary) the demographic data presented in this chapter.

A. Summary of Demographic Characteristics of Seniors

United States Census data (2000) indicates that approximately 98,000 or 11% of Montgomery County's residents are 65 years and older. By 2030, it is estimated that this cohort of individuals will increase to 186,968 and account for 17% of the County's residents.² The different reports listed in the table on the previous page echo the news contained in the Census data estimates, with predictions that the number of County residents aged 65 and older will increase significantly. The information presented in this section highlights the demographic information contained in the recent studies. In sum:

Population

- Over 98,000 individuals 65 years and older reside in Montgomery County, representing 11% of the total County population.
- Approximately 26,000 of the County's seniors are between 65 and 69 years of age; 24,000 are 70 to 74 years of age, and 27,000 are 80 years and older.
- Residents over 75 years of age, who typically require the most support services, represent 5.5% of the total County population.
- The number of persons age 85+ increased 73% between 1990 and 2000.
- Projections indicate that the senior population will increase from 98,000 in 2000 to 127,000 in 2010 and to 160,000 in 2020. By 2030, people age 65 years and older will account for an estimated 17% of the total County population.

Income

- Approximately 14% of senior households have incomes at or below 30% of the median County income. Another 24% have incomes between 30% to 60% of the median County income.

Living Arrangements

- 4% of County residents over 65 years of age reside in nursing homes, and approximately 2% reside in group homes.
- 32% of seniors 75 years and older live in one-person households; meaning 15,000 County residents over 75 years of age live alone. Seniors living alone are more likely to need assistance with daily activities.

² Source: M-NCPPC's Research Division (based on latest population and housing forecast data (Rnd 6.4a).

Education and Diversity

- 26% of 65-74 year olds and 16% of 75-84 year olds hold advanced degrees. 50% of 65-74 year olds own a computer.
- Almost 20% of County seniors 65 years and older are African American, Asian, or Hispanic.

Health

- Nearly a third (31%) of County seniors reported some type of sensory, physical, mental and/or self-care disability. Of those who reported a disability, approximately 63% are females. About 75% of the disabled senior population who reported an income below the poverty level are also female.
- Family and friends provide 80% of all long-term care services used by seniors. Many seniors are caring for a spouse, sibling, or a friend, and an increasing number of seniors provide custodial care for one or more grandchildren.

B. Summary of Recent Studies Related to Seniors in Montgomery County

This section provides a brief summary of each study listed in Table 1 (page 3) and highlights any key findings and recommendations.

1. *Services for the Elderly in Montgomery County, League of Women Voters (Maryland division), June 2004*

This study addresses the anticipated exponential growth of the County's elderly population, their transportation needs, and describes various services and programs provided by the County Government. The study recommends that Montgomery County:

- Develop a comprehensive plan to meet the service needs of the aging population.
- Balance the needs of the frail elderly with the needs of healthy, active seniors.
- Continue to expand the Medicaid Waiver program and the National Family Caregiver Support program to maintain seniors in the community.
- Actively plan to meet present and future housing needs, particularly for low-and-middle-income seniors.
- Provide more transportation services to seniors, especially to Up-County residents.
- Work to improve staffing standards and quality assurance measures in nursing homes and assisted living facilities.
- Include the broad community, public, and private sector as well as volunteer organizations and seek private and grant funding when possible.

2. *A call for Action on the Growth of Montgomery County's Aging Population (White Paper Report), Grass Roots Organization for the Well-Being of Seniors (GROWS), January 2004*³

The GROWS study reports that there is an enormous wave of senior needs approaching the County. To meet the anticipated increased demand for services, the study recommends that the County develop a comprehensive strategic plan. GROWS anticipates that the plan would take two years to develop at an estimated cost of \$500K.

3. *FY 04 Area Plan Update, Area Agency on Aging (within DHHS), February 2004*

By law, DHHS' Aging and Disability Services must submit an annual plan to the Maryland Department of Aging.⁴ The division within Aging and Disability Services responsible for submitting the plan is the Area Agency on Aging.⁵ The plan includes information such as the number of seniors served, changes in resources, gaps in service, as well plans for targeting low-income elderly in the County with unmet needs. The plan becomes the grant application for the Older American Act funds.

4. *Strategic Planning Study, DHHS' Aging and Disability Services, December 2002*

In 2002, DHHS' Aging and Disability Services contracted with the Center for Productive Aging, Towson University to describe the demographic characteristics of the County's seniors and to project their future needs.

The study reports that the first wave of baby boomers turning age 65 will "flood" the County's population of seniors. In particular, the number of seniors 85 years and older will continue to increase, as more and more people live longer. This trend will place substantial pressure on County programs and services. Other issues compounding the trend include an increase number of seniors with limited English proficiency, a decrease in affordable housing, and an increase in diseases such as Diabetes and Alzheimer's.

The report recommends that the County:

- Develop a systematic and more centralized approach to collecting socio-demographic information about who uses services provided to elderly and disabled individuals living in the County.

³ According to GROWS literature, the organization was founded by individuals who saw gaps in senior services and wanted to take action to improve the quality of life of seniors in the County. GROWS incorporated as a not-for-profit 501 (c) 3 organization in 1992.

⁴ The Older Americans Act requires that the County submit an annual plan to the State. In turn, the Act also requires that Maryland provide annual report to the U.S. Administration on Aging.

⁵ In 1996, services provided by the State Department of Social Services in Montgomery County were combined with County operated health and social services departments/agencies to form the Montgomery County Department of Health and Human Services. The Area Agency on Aging was one of the State functions that is now administered by the County.

- Develop a staffing/volunteer service delivery plan to keep pace with the growth in numbers of elderly in the County.
- Develop programs, services, and outreach efforts to meet the needs of expanding minority populations with foreign language barriers.
- Target low-income and elderly renters, particularly those living alone, as an at-risk population.
- Target family caregivers as a resource to public programs.

5. *A Report on the Needs of Low Income Seniors – Montgomery County, Maryland, DHHS’ Aging and Disability Services, June 2002*

DHHS’ Aging and Disability Services contracted with the Center for Health Program Development and Management at the University of Maryland-Baltimore County to conduct a survey of low-income older individuals; defined as those with household incomes under \$25K and age 75 or older. 304 low-income seniors consented to be interviewed face-to-face. In sum, the report cites that this population has significant unmet needs, and that in periods of economic decline they are disproportionately affected by cutback in services. The report recommends that the County:

- Assist seniors in applying for eligible financial assistance programs;
- Expand outreach to seniors in ethnic and language minority communities;
- Enhance mental health service among the elderly;
- Promote reverse mortgages to address unmet needs resulting from limited financial resources;
- Enhance public and para-transit and other transportation resources;
- Implement an exercise initiative for seniors; and
- Conduct follow-up studies that focus on minority populations to determine their unique characteristics and needs.

6. *Transportation Services for Seniors and People with Disabilities, Office of Legislative Oversight, March 2002*

This report found that the Council appropriated \$3.7 million of County funds in FY 02 for an array of transportation services for seniors and people with disabilities, including \$2.5 million for curb-to-curb transportation, \$806,000 for fixed route Ride On transportation, \$211,000 for assisted/escorted transportation, and \$186,000 for transportation information services.

The report states that policy and budget decision-making on transportation services for seniors and people with disabilities has been dispersed among several County departments and Council Committees. To enhance Council decision-making about this array of services, OLO recommended that the Council:

- Approach funding decisions on transportation services for seniors and people with disabilities within the context of all relevant transportation services available;
- Articulate the Council's goals and priorities for future funding of transportation services for seniors and persons with disabilities; and
- Pursue additional information about transportation needs among seniors and people with disabilities, for use in budget decision-making and goal priority-setting.

7. *Intensive Budget Review on Aging and Disability Services, County Council Staff, January 2002*

This report examines the 28.4 million dollars appropriated to DHHS' Aging and Disability Services in FY 2002, and recommends a framework for making future budget decisions based upon the purpose of the funds and the key result or goal of the service.

The report recommended that the Council:

- Continue to advocate for state funding and adopt a formal written policy for appropriating County funds to supplement state programs;
- Ask the Management and Fiscal Policy Committee to review the current system of awarding contracts non-competitively;
- Request DHHS to provide annual updates on the impact of the new Medical Assistance Waiver for Older Adults; and
- Request DHHS to provide a time line for development of meaningful outcome measures, particularly for contracted programs and services.

8. *Need for Housing for Older Adults in Montgomery County, M-NCPPC, April 2001*

This report provides detailed information about the need for and supply of housing for seniors in Montgomery County. The report notes that Montgomery County offers a full array of senior housing to its residents.

The report states that the County appears close to achieving an appropriate supply of housing for its older residents. The report concludes that to accommodate both growth and the needs of under-served segments of the population, the County needs an average of 200 to 250 new senior housing units each year for the next 10 years. However, the report also states that current gaps in the supply (e.g., limited assisted living units for low-income households and too little middle income senior housing), could justify a 10-year increase of another 500 to 1,000 units.

9. *The Senior Initiative: Assuring that Montgomery County's Seniors Age with Dignity and Vitality*, Collaborative effort by multiple County departments and agencies, January 2001

Thirteen County agencies/departments/offices⁶ produced *The Senior Initiative*. The goals of the initiative are to promote the vital aging of senior residents and to assure that a full range of support services are available, affordable, and easily located when they are needed.

As part of the process, the County sponsored a conference, in which community leaders from public, private, civic, religious, business, and ethnic/minority organizations attended. The report states that many of the recommendations from the conference are contained in the Senior Initiative. The report includes an estimation of the fiscal impact of the initiatives between FY 02 and FY 07.

C. List of Additional Senior-Related Studies

Table 2 on the following page lists additional studies completed since 1986 that relate to seniors in Montgomery County, but were not included in OLO's detailed summaries in Section B. These additional studies were published by a variety of governmental and non-governmental organizations. The multitude of studies indicate ongoing efforts to identify and plan for future/emerging needs of seniors.

⁶ Commission for Women, Offices of the County Executive, Fire and Rescue Services, Health and Human Services, Housing Opportunities Commission, Housing and Community Affairs, Information and Telecommunications, Management and Budget, Police, Public Libraries, Public Works and Transportation, Recreation, and Volunteer Center.

Table 2
Additional Senior-Related Reports and Studies

Title	Prepared by:	Date Issued
<i>Profile of Montgomery County Seniors – Census 2000</i>	DHHS, Aging and Disability Services	2003
<i>The Many Faces of Aging in Montgomery County</i>	DHHS, Aging and Disability Services	2002
<i>2001-2002 Report to the Governor</i>	Maryland Caregivers Support Coordinating Council	October 2002
<i>Recommendations of the Commission on the Future – Seniors</i>	Council Staff	January 2001
<i>Strategy Paper/Engaging the Public/Transportation Policy Report Phase II</i>	M-NCPPC	October 2000
<i>Community Based Capacity Building for Asian and Pacific Islander Elders</i>	National Asian Pacific Center on Aging	July 2000
<i>Highlights from Elder Small Group Discussions – Northern VA and Montgomery County Capacity Building Conference</i>	National Asian Pacific Center on Aging	March 2000
<i>Health Summit, Optimal Aging Summary Report</i>	DHHS, Aging and Disability Services	June 1999
<i>Adult Protective Service, Briefing Report</i>	DHHS, Adult Protective Services	October 1998
<i>Core Service Agency Mental Health Plan</i>	DHHS	August 1998
<i>Task Force on Personal Care</i>	Maryland Department of Human Resources	September 1997
<i>Report on Senior Transportation</i>	Commission on Aging	May 1997
<i>Unmet Needs of Seniors and Gaps in Services to Seniors in Montgomery County</i>	Human Services Policy Group, Senior Policy Subgroup	May 1994
<i>The Status and Needs of Elder Citizens in 1986</i>	Department of Family Resources, Elder Affairs	March 1987

Source: DHHS' Aging and Disability Services, November 2004

Chapter III. Selection and Categorization of Programs

A. The Selection Process

OLO used multiple sources to identify programs designed to serve seniors for the inventory. These sources included:

- Program information contained in recent studies/reports related to seniors. Chapter II summarizes the recent studies/reports used.
- Consultation with County Government staff and County Council staff familiar with programs designed to serve seniors.
- The most recent *Montgomery Measures Up!*,¹ County Government budget documents, and County Council budget packets.

Seniors receive an array of County Government services. However, OLO only selected those programs that have a clearly stated purpose of serving seniors. The inventory does not include general County Government services that are available to all County residents.

Challenges of Compiling the Inventory

Compiling the inventory of programs designed to serve seniors and determining the total costs and revenues was challenging because there is no universal definition of a “senior.” Further actual expenditures, revenues, and performance measurement data for seniors are not readily available for all programs.

Definition of “senior.” County Government programs do not operate with a single definition of a “senior.” In short, eligibility to the range of County Government programs designed to serve older adults varies by program to program. And, for some programs, age is only one eligibility criterion considered; the other primary criterion is income.

For many programs designed to serve seniors, state and federal law mandate the age eligibility criteria. For other programs, County government policies and procedures govern the age threshold. Appendix A details the age eligibility criteria, and who establishes the criteria for each program.

Many of the programs that serve seniors also serve adults with disabilities and low income residents. For these programs, OLO and program staff agreed to adopt the Older Americans Act’s general definition of a senior; a person who is 60 years and older.

¹ The Office of Management and Budget’s *Montgomery Measures Up!* document provides detailed information on the performance of Montgomery County’s programs and services. Each program in the document contains input, output, outcome, service quality, and efficiency measures.

Estimating Costs. Determining the total cost of programs designed to serve seniors was also challenging. Where possible, OLO used actual expenditure and revenue information. In some cases, the funding data represents estimates because:²

- As mentioned above, many of the programs serve target groups other than seniors, e.g., adults with disabilities and low-income residents. For these programs, program staff reviewed clientele data and estimated the proportion of program clients that were 60 years and older. OLO used the estimate to prorate the program's expenditures and revenues.
- Several programs fall within larger budget categories. For these particular programs, OLO and program managers estimated the number of workyears associated with each program, and prorated expenditures and revenues accordingly;
- Information is not readily available to determine how Federal Financial Participation (FFP) reimbursement offsets County tax dollars at the program level. (A proportion of the County's funding for senior programs is eligible for Federal Financial Participation (FFP) reimbursement.) DHHS staff report that FFP reimbursement is tracked on a macro basis, and is not easily identifiable by program because of the complexity, scope, and requirements of the Department's Federal claim.
- In a current fiscal year, programs may receive less than what is anticipated from the state and federal government.

B. Categories of Services to Seniors

In consultation with County Government staff, OLO established eight categories of services to seniors. The categories represent the diverse range of services provided by the County Government. The table on the following page presents and describes the eight categories of services to seniors.

² For each program listed in Appendix A, the "funding section" identifies whether the funding is actual or estimated.

Table 3
Eight Categories of Services to Seniors

Category Number	Name	Description	Examples of Services
1	Protective/Guardianship	Provides services to protect or guard seniors from personal and financial harm.	<ul style="list-style-type: none"> • Investigation and intervention in abuse cases* • Ensuring the safety of residents in nursing homes and assisted living facilities
2	In-Home Assistance	Provides day-to-day support services to homebound seniors.	<ul style="list-style-type: none"> • Bathing, feeding, grooming, and assistance with ambulation • Housekeeping, laundry, shopping, meal preparation, and budgeting • Respite for senior's caregiver
3	Housing	Provides seniors with a continuum of housing options.	<ul style="list-style-type: none"> • Development and rehabilitation of affordable housing • Housing placement • Rental assistance
4	Nutrition	Provides nutritious meals, dietary advice, and nutritional education.	<ul style="list-style-type: none"> • Meals served at a senior's place of residence or congregate sites • Nutritional education at senior centers
5	Health-Related	Provides education/treatment of physical and mental illness.	<ul style="list-style-type: none"> • Mental health services for seniors • Health education
6	Transportation	Provides transportation alternatives for seniors.	<ul style="list-style-type: none"> • Discounted fares for public transportation • Fixed route, curb-to-curb, and escorted transportation • Information dissemination on various transportation providers
7	Recreation, Leisure, and Continuing Education	Assist seniors in staying physically active, healthy, and interested in life.	<ul style="list-style-type: none"> • Fitness, health, and wellness activities • Life long learning opportunities • Entertainment and social activities
8	Fiscal, Legal and Other Support	Provides seniors with a range of supportive services.	<ul style="list-style-type: none"> • Information and referral • Employment and volunteer activities • Fiscal and legal assistance.

*The Protective/Guardianship category does not include preliminary investigations of abuse cases conducted by police patrol officers.
Source: OLO and County Government Staff, November 2004

Chapter IV. Inventory and Fiscal Analysis

OLO worked with department staff to compile a list of County programs designed to serve seniors. The inventory includes 31 programs administered by the following nine County Government departments/offices:

- Department of Health and Human Services
- Department of Housing and Community Affairs
- Department of Public Works and Transportation
- Department of Recreation
- Montgomery County Police Department
- Montgomery County Fire and Rescue Service
- Montgomery County Public Libraries
- Montgomery County Volunteer and Community Services Center
- Office of the County Attorney

For each program, OLO compiled data on program expenditure and revenue for fiscal years 2003, 2004, and 2005. Where possible, OLO used actual expenditure and revenue information. In some cases, the funding data represent estimates.¹

The balance of this chapter includes three sections:

- **Section A** provides an overview of the total FY 05 funding (County and non-County) for programs designed to serve seniors across County Government, and highlights changes in funding between FY 03 and FY 05;
- **Section B** examines how the FY 05 funding for programs in the inventory is divided among eight categories of services to seniors; and
- **Section C** lists the specific programs designed to serve seniors across County Government, and shows changes in funding between FY 03 and FY 05 for each program/activity.

Appendix A contains a program-by-program description of items included in the inventory. The Appendix also summarizes the County and non-County funding for each program across County Government for Fiscal Years 2003, 2004, and 2005.

In addition, Chapter V (beginning on page 33) summarizes the performance measures collected, tracked, and reported for programs in the inventory; examines the level of coordination among the programs; and describes recent strategic planning efforts for programs designed to serve seniors.

¹ For each program listed in Appendix A, the “funding section” identifies whether the funding is actual or estimated. Chapter III (page 11) provides an explanation of why estimates rather than actuals are used.

A. Overview of Expenditures and Revenues

For the 31 programs designed to serve seniors, the County Council appropriated an estimated total of \$32 million in FY 05.² This represents an increase of \$5.9 million or 23% over the estimated FY 03 expenditures. Non-County funding (primarily state and federal grants) account for 25% of the FY 05 funding.

The County Government receives revenue through federal, state and hospital reimbursements, and user fees. In FY 05, the County Government expects to receive an estimated \$1.9 million in revenue from nine programs. This represents an increase of 1% over FY 03 revenues.

1. FY 05 Expenditures

In FY 05, the County Council appropriated an estimated \$32 million in County and non-County funds to support 31 programs.² These programs are delivered by nine departments/offices.³ The charts on page 16 illustrate the bottom-line division between County and non-County funds, and the distribution of the \$32 million across County Government. Table 4 on page 17 provides the estimated FY 05 County and non-County expenditure by department/office.

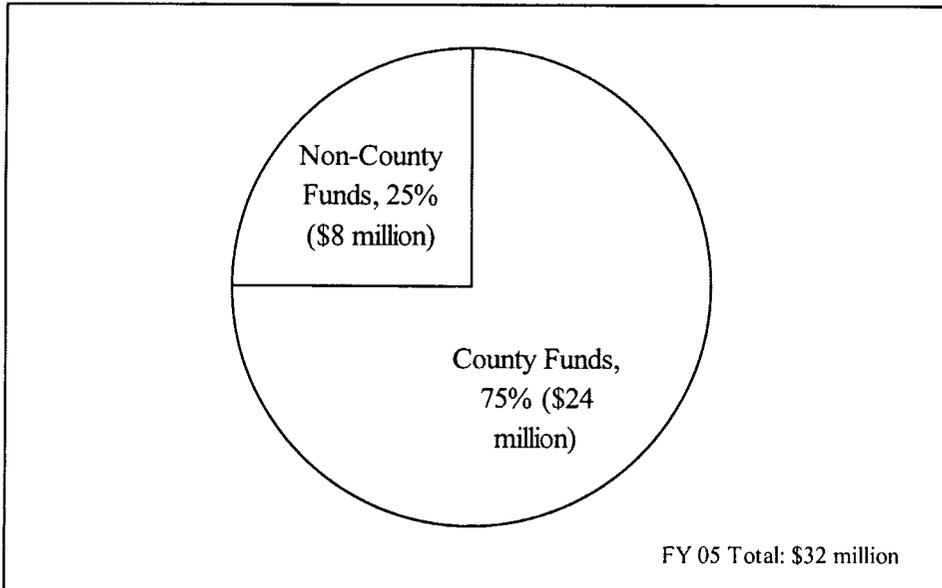
In sum,

- County funds constitute \$24 million or 75% of FY 05 expenditures. The \$8 million in outside funds are primarily state and federal grants.
- The Department of Health and Human Services expect to spend \$18 million and the Department of Housing and Community Affairs anticipate spending \$8 million for programs designed to serve seniors. Together, these two departments account for 83% of the total FY 05 expenditures.
- The Department of Public Works and Transportation and Department of Recreation expect to spend \$3.7 million and \$1.4 million respectively for programs designed to serve seniors, and together account for another 15% of the total FY 05 expenditures.
- Five departments/offices split the remaining 2% of the \$32 million: Montgomery County Police Department (\$207K); Montgomery County Fire and Rescue Services (\$115K); Montgomery County Volunteer and Community Services Center (\$121K); Office of the County Attorney (\$35K); and Montgomery County Public Libraries (\$20K).

² In FY 05, the County Council also appropriated \$130K to the Community Grant's Non-Departmental Account to support non-profit organizations in the delivery of programs that serve seniors. Appendix A (©7) shows the amount of funding, by organization, provided through this Non-Departmental Account for fiscal years 2003, 2004, and 2005.

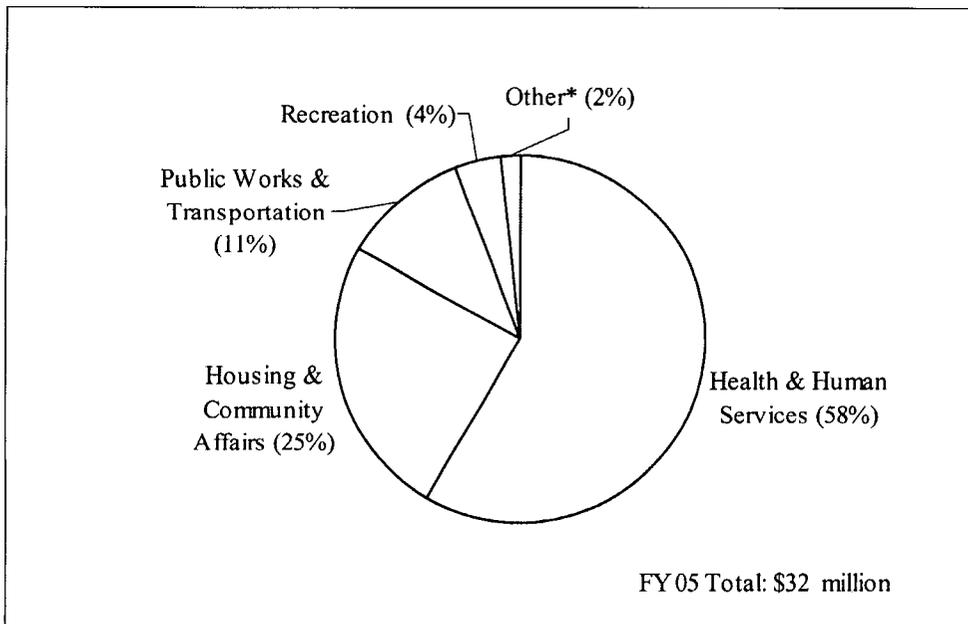
³ Page 28 of this chapter lists the programs designed to serve seniors contained in the inventory.

Chart 1
Percent of FY 05 County and Non-County Funds for County Government Programs Designed to Serve Seniors



Source: OLO, November 2004

Chart 2
Distribution of FY 05 County and Non-County Funds for County Government Programs Designed to Serve Seniors by Department



* Other Departments include Montgomery County Police Department, Montgomery County Fire and Rescue Service, Montgomery County Volunteer and Community Center, Office of the County Attorney, and Montgomery County Public Libraries. Source: OLO, November 2004

Table 4
ESTIMATED FY 05 COUNTY AND NON-COUNTY EXPENDITURES FOR PROGRAMS
DESIGNED TO SERVE SENIORS BY DEPARTMENT

Department/Office	FY 05 Estimated Expenditure (\$ in 000's)		
	County	Non-County	Total
Health and Human Services	10,741	7,331	18,072
Housing and Community Affairs	8,181	90	8,271
Public Works and Transportation	3,326	379	3,705
Recreation	1,385	0	1,385
Other			
Fire/Rescue Service	34	81	115
Libraries	20	0	20
Volunteer Center	31	131*	161
Police	207	0	207
County Attorney	35	0	35
TOTAL	\$23,960	\$8,012	\$31,972

*\$41K of the \$131K is provided by Aging and Disability Services by way Older Americans Act grant funds. The \$41K funds the Volunteer Center's Telephone Reassurance Program.

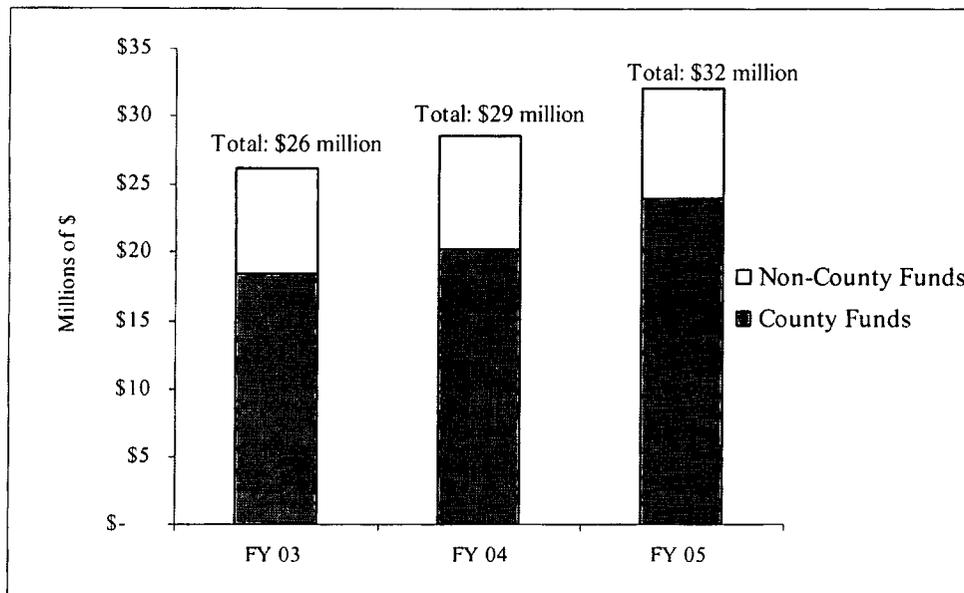
Source: OLO and County Government Staff, November 2004

2. Changes in Expenditures (FY 03 – FY 05)

Changes to Total Expenditures. Chart 3 on the following page shows the changes in program expenditures between FY 03 to FY 05, across County Government. In FY 05, the County Council appropriated \$5.9 million or 23% more to support programs designed to serve seniors than FY 03.

Chart 3 also shows that the County's share of funding increased each year for the past three fiscal years. The amount of outside funding remained comparatively unchanged during the same period. Further analysis of program expenditures shows that the County's share of funding increased 30% between FY 03 and FY 05. Whereas, the amount of non-County funding increased only 4.5% during the same period.

Chart 3
FY 03 to FY 05 Changes in Expenditures for Programs Designed to Serve Seniors



Source: OLO, November 2004

Increased Expenditures for Selected Programs. A number of programs received a disproportional increase between FY 03 and FY 05 funding. Specifically,

- The Department of Housing and Community Affairs' Housing Initiative Fund and Home Program allocated \$4 million dollars of County tax money and federal funds for elderly housing projects.
- The Montgomery County Fire and Rescue Services' Fire and Rescue Senior Outreach program received approximately \$80K; an increase of 1053% over FY 03 funding. The funding is part of a larger Federal Emergency Management Agency grant to implement the "Remembering When program", a fire and fall prevention program for seniors;
- DHHS' Domiciliary Care Program received nearly \$170K in FY 04; an increase of 222% over FY 03 funding. The funding paid for the addition of two Community Health Nurses to regulate assisted living facilities.

Decreased Expenditures for Select Programs. A number of programs received a decrease between FY 03 and FY 05 funding. Specifically,

- Aging and Disability Services' Adult Protective Services (4% decrease), Assisted Living Services (3% decrease), In-Home Aide Services (4% decrease), Adult Evaluation and Review Services (7% decrease), Guardianship Program (8% decrease) and Social Services to Adults (3% decrease).⁴
- Montgomery County Police Department's Elder Abuse Unit (4%).
- Department of Libraries' Book Delivery Services (Homebound Seniors and Nursing Homes) program (29%).

Changes to Non-County Funding. The amount of non-County funding of programs designed to serve seniors increased 4.5% between FY 03 and FY 05. The table on pages 20 and 21 show the changes by source of funding. In sum, the table shows that state funding decreased by 3% and federal funding increased by 25% over past three fiscal years. Nine of the 22 grants experienced a decrease in funding. The County Government no longer receives three grants.

The two largest sources of outside funds for FY 03, FY 04, and FY 05 are:

- a) The State Department of Human Resources' (HB 669) funding. DHHS uses these funds to help administer the following state programs: Adult Protective Services, Adult Evaluation and Review Services, Social Services to Adults, Public Guardianship, Assisted Living Services, Medical Assistance and Long Term Care, In-Home Aide Services, Respite Care, Senior Community Services, and Senior Information and Assistance. FY 05 HB669 funding increased 2% between FY 03 and FY 05.
- b) The federal government's Older Americans Act grant. This grant is also received by DHHS' and helps fund the following programs: Ombudsman Services, Senior Nutrition, Senior Community Services, Senior Information and Assistance, and the Telephone Reassurance Program (Montgomery County Volunteer and Community Services Center). FY 05 Older Americans Act funds increased 27% between FY 03 and FY 05.

⁴ Aging and Disability Services staff report that the reductions are primarily due to the reallocation of staff to another program designed to serve seniors (Medicaid Waiver for Older Adults) within Aging and Disability Services.

TABLE 5
SOURCE, AMOUNTS, AND PROGRAMS SUPPORTED WITH NON-COUNTY FUNDS

Source of Non-County Funds	FY 05 Amount (\$ in 000's)	% Increase/ (decrease) From FY 03	Programs Supported
State Grants			
Department of Human Resources (HB669)	3,174	2%	<ul style="list-style-type: none"> • Adult Protective Services • Adult Evaluation & Review Services • Social Services to Adults • Public Guardianship Program • Assisted Living Services • Medical Assistance & Long Term Care • In-Home Aide Services • Respite Care • Senior Community Program Services • Senior Information and Assistance
Senior Care Grant	582	(13%)	<ul style="list-style-type: none"> • Adult Protective Services • Social Services to Adults • Public Guardianship
Vulnerable Elderly Program Initiative*	54	(14%)	<ul style="list-style-type: none"> • Public Guardianship
Guardianship Program**	33	(39%)	<ul style="list-style-type: none"> • Public Guardianship
Senior Ombudsman Grant	258	(17%)	<ul style="list-style-type: none"> • Ombudsman Services
Senior Group Assisted Housing Grant	464	2%	<ul style="list-style-type: none"> • Assisted Living Services • Assisted Living Facilities (Public Health Services)
Meals Grant	98	10%	<ul style="list-style-type: none"> • Senior Nutrition
MAW Admin & Case Management Grant	230	(18%)	<ul style="list-style-type: none"> • Senior Community Program Services
IT Grant	7	(18%)	<ul style="list-style-type: none"> • Senior Community Program Services
Senior Information and Assistance Grant	73	(8%)	<ul style="list-style-type: none"> • Senior Information and Assistance
Senior Outreach Research Team (SORT) Grant	221	0%	<ul style="list-style-type: none"> • Mental Health for Seniors Program
Statewide Special Transportation Assistance Programs	379	4%	<ul style="list-style-type: none"> • Call 'N Ride
TOTAL	\$5,573	(3%)	

* The Vulnerable Elderly Project Initiative (VEPI) grant reduction is due to the receipt of a one-time-only amount of \$6K in FY 03.

** The Guardianship Program grant reduction is due to the receipt of a one-time-only amount of \$28K in FY 03.

Source: OLO and Department Staff, November 2004

TABLE 5
SOURCE, AMOUNTS, AND PROGRAMS SUPPORTED WITH NON-COUNTY FUNDS
(CONTINUED)

Source of Non-County Funds	FY 05 Amount (\$ in 000's)	% Increase/ (decrease) From FY 03	Programs Supported
Federal Grants			
Older Americans Act Grant	2,116	27%	<ul style="list-style-type: none"> • Ombudsman Services • Senior Nutrition • Senior Community Program Services • Senior Information and Assistance • Telephone Reassurance Program for Senior Care Givers
Senior Health Insurance Counseling Program	47	49%	<ul style="list-style-type: none"> • Senior Community Program Services
Medicaid Fraud & Abuse Education	16	(32%)	<ul style="list-style-type: none"> • Senior Community Program Services
Elderly Refugees*	0	(100%)	<ul style="list-style-type: none"> • Senior Community Program Services
Maryland Performance Outcome Measures	0	(100%)	<ul style="list-style-type: none"> • Senior Community Program Services
Housing and Urban Development Grant**	0	-	<ul style="list-style-type: none"> • HOME program spent on elderly housing projects
Federal Emergency Management Grant	81	-	<ul style="list-style-type: none"> • Fire and Rescue Senior outreach
Law Enforcement Block Grant	0	(100%)	<ul style="list-style-type: none"> • Community Outreach for Seniors (Police)
Corporation for National and Community Service	90	5%	<ul style="list-style-type: none"> • Retired and Senior Volunteer Program (RSVP)
Community Development Block Grant	90	(10%)	<ul style="list-style-type: none"> • Four non-profit organizations received public service grants to support programs designed to serve seniors
TOTAL	\$2,440	25%	

*Aging and Disability Services staff report that Catholic Charities now administer the Elderly Refugees grant.

**DHCA received a \$1.1 million Housing Urban Development grant in FY 04 from the federal HOME program.

***In FY 03, the Montgomery County Police Department used \$1,000 from a Local Law Enforcement Block grant to help fund their Community Outreach for Seniors program.

Source: OLO and County Government Staff, November 2004

3. Revenues

The table on the following page shows the revenue received from the inventory of programs designed to serve seniors. In FY 05, the County Government expects to receive an estimated \$1.9 million in revenue from nine programs. This represents an increase of 1% over FY 03 revenues.

- Five Aging and Disability Services programs will receive \$1.1 million in revenue in FY 05, a 7% increase over the FY 03 amount. The sources of this revenue are primarily state and federal reimbursements for services.
- Three Public Health Services nursing home and assisted living facilities regulatory programs anticipate receiving approximately \$400K in FY 05; a 20% increase over FY 03 actual expenditures; and
- DPWT's Call 'N Ride anticipates over \$300K in coupon sales in FY 05; a 17% increase over FY 03 revenue.

Table 6
Revenue Received by Programs Designed to Serve Seniors (FY 03 – FY 05)
(\$ in 000's)

Program	Source of Revenue	FY 03 Actual	FY 04 Actual	FY 05 Estimated	% Change from FY 03 to FY 05
DHHS - Aging and Disability Services					
Adult Evaluation and Review Services	Statewide Evaluation and Planning Services (STEPS)	55	54	34	(38%)
In-Home Aide Services	Program Clients: Sliding Fee for Services	16	18	13	(17%)*
Medical Assistance & Long Term Care	Private Hospitals: Reimbursement	183	191	218	19%
	Federal Financial Participation Match**	183	191	218	19%
Senior Nutrition Program	Federal Government: Services Incentive Program Reimbursement	90	99	99	10%
Senior Community Services Program	Federal Government: Medicaid Waiver Management/Administrative Reimbursement	295	524	400	35%
	State Government: Reimbursement for MA LTC Waiver	262	173	182	(31%)
Sub-Total		\$1,084	\$1,250	\$1,164	7%
DHHS - Public Health Services					
Domiciliary Care Homes	State Government: Reimbursement	41	76	39	(5%)
	Facilities: County Licensure Fees	18	22	18	1%
Nursing Homes	Federal and State Reimbursement	336	554	238	(29%)
	Facilities: County Licensure Fees	58	66	60	3%
Assisted Living Facilities	Facilities: County Licensure Fees	50	50	46	(7%)
Sub-Total		\$503	\$768	\$401	20%
DPWT					
Call 'N Ride	Program Clients: Coupon Sales	279	273	326	17%
TOTAL		\$1,866	\$2,291	\$1,891	1%

*The revenue received from In-Home Aide Services decreased because the State's calculation method changed.

**The Federal Financial Participation (FFP) revenue shown is for hospital reimbursement contracts only. Aging and Disability Services also claim additional FFP reimbursement for the program as part of Department's overall FFP claim.

Source: OLO and County Government Staff, November 2004

B. Funding by the Eight Categories of Services to Seniors

This section looks at how the FY 05 funds appropriated for programs in the inventory are divided among eight categories of services to seniors. OLO developed the following categories in consultation with department staff.⁵

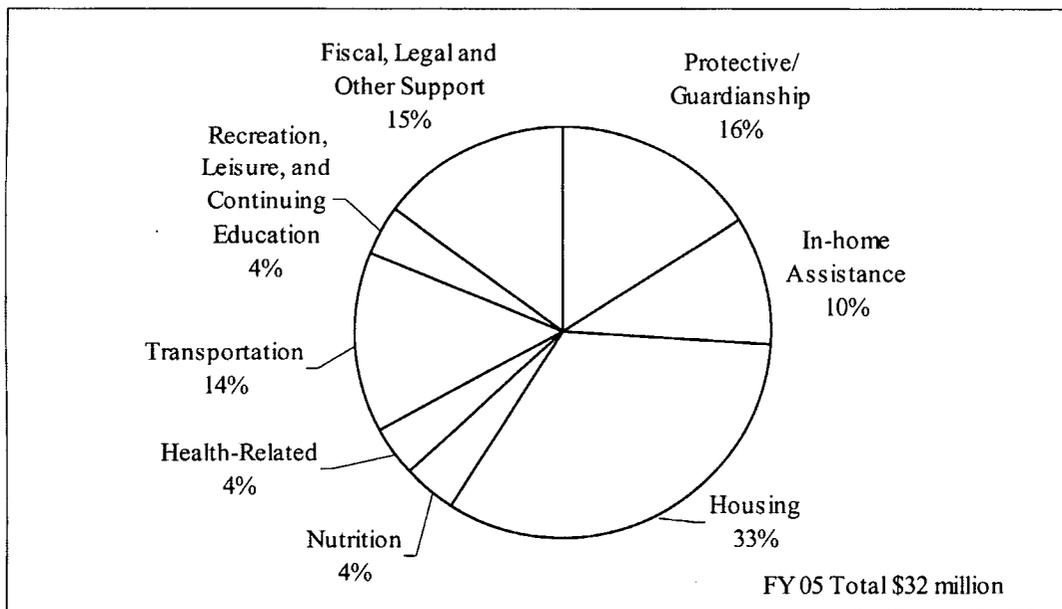
- Category #1: Protective/Guardianship
- Category #2: In-Home Assistance
- Category #3: Housing
- Category #4: Nutrition
- Category #5: Health-Related
- Category #6: Transportation
- Category #7: Recreation, Leisure, and Continuing Education
- Category #8: Fiscal, Legal and Other Support

OLO worked with agency staff to sort programs into the above eight categories. For programs that involve activities in more than one category, program costs were split accordingly.

1. FY 05 Funding By Category

Chart 4 below illustrates the percent distribution of the \$32 million across the eight categories.

Chart 4
Percent Distribution of FY 05 Funds Across Eight Categories of Services to Seniors



Source: OLO and Department Staff, November 2004

⁵ Chapter III (page 11) describes the eight categories.

The Council appropriated \$32 million in FY 05 to programs designed to serve seniors. Of this total amount:

- **\$10.5 million (33%) funds two County Government housing programs for seniors.** \$8.1 million funds the Department of Housing and Community Services' Housing Initiative Fund and Home program. This program uses a mix of County funds (HIF funds) and federal funds (HOME) to make loans to non-profit and for profit developers of affordable housing for seniors. The funding helps the County meet a number of housing goals, including:

- Renovating distressed properties;
- Preserving housing that could be lost from the affordable housing stock;
- Special needs housing;
- Helping to create mixed-income communities;
- Making sure that housing programs build neighborhoods and not just housing units; and
- Working toward an equitable distribution of affordable housing units.

\$1 million assists seniors with the cost of rent. This money is allocated to DHHS' Rental Assistance Program. The remaining dollars fund DHHS' Assisted Living Services program.

- **\$5 million (16%) funds Protective/Guardianship type program and services.** \$3.8 million of this amount is allocated to DHHS' Aging and Disability Services to fund the following programs: Adult Protective Services; Adult Evaluation and Review Services; Social Services to Adults; Guardianship Program; and Ombudsman Services.

\$1.1 million of the \$5 million is allocated to DHHS' Public Health Services to fund programs that regulate nursing home and assisted living facilities. The remaining money funds the Office of the County Attorney's Child and Adult Protective Services Unit (\$35K) and the Police Department's Elder Abuse Unit (\$79K).

- **\$4.7 million (15%) funds Fiscal, Legal, and Other Support Programs.** \$4.4 million is allocated to three Aging and Disability Services' programs that provide information and referral, employment and volunteer opportunities, education (e.g., crime prevention), financial and legal assistance.

The remaining \$300K is split among five programs: Montgomery County Volunteer and Community Services Center's Retired and Senior Volunteer Program (RSVP) and Telephone Reassurance Programs; Department of Housing and Community Affairs' Public Service Grants program (for senior-related programs delivered by non-profit organizations, only), and Montgomery County Police Department's Community Outreach program.

- **\$4.4 million (14%) funds six transportation programs.** \$3.6 million of this amount funds DPWT's Ride On (Discounted Fares for Seniors); Call 'N Ride and Community Outreach program. The other \$800K funds three transportation programs provided by way of contract through the DHHS' Aging and Disability Services (Program Transportation, Escorted Transportation, The Senior Connection).
- **\$3.2 million (11%) funds DHHS' Aging and Disability Services In-Home Aide and Respite Services programs.** These programs provide a wide range of in-home assistance to homebound seniors.
- **\$1.4 million (4%) funds programs within the category of Recreation, Leisure, and Continuing Education.** \$1.38 million of this amount funds the Department of Recreation Seniors Program. The remaining \$20K funds the Montgomery County Public Libraries' Book Delivery Services program (Homebound Seniors and Nursing Homes).
- **\$1.3 million (4%) funds programs within the category of Nutrition.** \$1.2 million of this amount funds Aging and Disability Services' Senior Nutrition Program. The remaining \$100K supports two contracts awarded through Aging and Disability Services, Community Services Program: Food and Friends and Grocery Shopping for Seniors.
- **\$1.2 million (4%) funds Health-Related programs.** \$550K of this amount funds DHHS' Mental Health for Seniors program. Another \$550K funds DHHS' Senior Dental Services program. The remaining \$100K funds a prevention and education program operated by MCFRS that targets seniors.

2. FY 03 to FY 05 Changes in Funding by Service Category

Table 7 below shows the changes in funding by service category between FY 03 and FY 05. In sum, the data show increased expenditures in all eight categories of services to seniors between FY 03 and FY 05. The largest increase is in the housing category with a 47% increase over FY 03 expenditures. In-Home Assistance experienced the smallest increase (1%).

**Table 7
FY 03 to FY 05 Funding Changes for Programs Designed to Serve Seniors, by Category**

Category	Total FY 03 Expenditure (\$ in 000's)	Total FY 05 Expenditure (\$ in 000's)	Percent Change
Housing	7,158	10,546	47%
Health-Related	917	1,216	33%
Nutrition	1,038	1,311	26%
Fiscal, Legal, and Other Support	4,002	4,777	19%
Transportation	3,804	4,447	17%
Recreation, Leisure, and Continuing Education	1,215	1,405	16%
Protective/Guardianship	4,668	5,027	8%
In-Home Assistance	3,225	3,243	1%
TOTAL	\$26,027	\$31,972	23%

Source: OLO and Department staff, November 2004

C. Inventory of Programs Designed to Serve Seniors

This section presents tables that summarize, by department, the programs included in the inventory of programs designed to serve seniors. The tables include page references to Appendix A where the reader can find more information on each program, including its stated goals and description of activities, FY 03, FY 04, FY 05 expenditures⁶ and revenues staffing level, contractual arrangements, sources of funds, and performance measures. Each program write-up also includes information on the level of coordination among other senior programs as well as information on strategic planning efforts.

The Inventory

Table 8
The Inventory of County Government Programs Designed to Serve Seniors

Department	Table on page:
Department of Health and Human Services	29
Department of Housing and Community Affairs	30
Department of Public Works and Transportation	30
Department of Recreation	30
Montgomery County Police Department	31
Montgomery County Volunteer and Community Services Center	31
Montgomery County Fire and Rescue Service	31
Office of the County Attorney	32
Montgomery County Public Libraries	32

⁶ For many of the programs listed in the tables on page 29 through 32, the amounts shown have been prorated for seniors. The formula used to prorate program funding is explained in each program summary listed in Appendix A.

Department of Health and Human Services

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
AGING AND DISABILITY SERVICES				
Adult Evaluation & Review Services	Protective/Guardianship	692,552	(7%)	7
Adult Protective Services	Protective/Guardianship	1,107,364	(4%)	11
Assisted Living Services	Housing	1,269,845	(3%)	17
In-Home Aide Services	In-Home Assistance	2,795,700	(4%)	21
Medical Assistance Outreach and Long Term Care	Fiscal, Legal & Other Support	1,184,429	10%	26
Ombudsman Services	Protective/Guardianship	578,379	19%	30
Public Guardianship Program	Protective/Guardianship	502,855	(8%)	34
Respite Care	In-Home Assistance	446,952	37%	38
Senior Community Program Services	Fiscal, Legal & Other Support, Transportation, Nutrition	3,050,235	16%	42
Senior Information and Assistance	Fiscal, Legal & Other Support	1,001,406	22%	53
Senior Nutrition Program	Nutrition	1,214,030	25%	57
Social Services to Adults	Protective/Guardianship	913,642	(3%)	63
PUBLIC HEALTH SERVICES				
Assisted Living Facilities	Protective/Guardianship	163,256*	23%	68
Domiciliary Care Homes	Protective/Guardianship	267,910	300%	71
Nursing Homes	Protective/Guardianship	687,021	44%	75
Senior Dental Services	Health-Related	564,347	48%	79
BEHAVIORAL HEALTH AND CRISIS SERVICES				
Mental Health Services for Seniors	Health-Related	536,600	2%	87
Rental Assistance	Housing	1,095,333	4%	97
TOTAL		\$18,071,856	8%	

*\$46,435 of the \$163,256 is provided by Aging and Disability Services by way of Senior Group Assisted Housing Grant monies.

Department of Housing and Community Affairs

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Housing Initiative Fund and Home Program	Housing	8,181,300	70%	99
Public Service Grants*	Fiscal, Legal and Other Support	90,000	(50%)	101
TOTAL		\$8,271,300	69%	

* Four non-profit organizations received Public Service Grants to support the delivery of programs that serve seniors (see © 101 for details).

Public Works and Transportation

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Call 'N Ride	Transportation	2,227,542	21%	104
Ride On (Discounted Fares for Seniors)	Transportation	1,312,437	33%	107
Senior/Disabled Community Outreach Program	Transportation	164,910	4%	109
TOTAL		\$3,704,889	24%	

Department of Recreation

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Senior Programs	Recreation, Leisure, and Continuing Education	1,384,970	17%*	113
TOTAL		\$1,384,970	17%*	

*Department staff report that this increase may reflect the recent confluence of two recreation programs (Senior Programs and Therapeutic Recreation).

Montgomery County Police Department

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Community Outreach for Seniors	Fiscal, Legal and Other Support	127,860	38%	118
Elder Abuse Unit	Protective/Guardianship	78,900	(4%)	121
TOTAL		\$206,760	19%	

Montgomery County Volunteer and Community Services Center

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Retired & Senior Volunteer Program	Fiscal, Legal and Other Support	121,180	4%	123
Telephone Reassurance Program*	Fiscal, Legal and Other Support	41,000	0%	127
TOTAL		\$162,180	39%	

*DHHS' Aging and Disability Services provides the funding for this program using Older Americans Act grant monies.

Montgomery County Fire and Rescue Service

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Fire & Rescue Senior Outreach	Health-Related	115,300	1053%	129
TOTAL		\$115,300	1053%	

Office of the County Attorney

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Child and Adult Protective Services	Protective/Guardianship	35,000	0%	133
TOTAL		\$ 35,000	0%	

Montgomery County Public Libraries

Program	Service Category	FY 05 Estimated Expenditure (\$)	Percent Increase/ (Decrease) from FY 03	Program Summary in Appendix A at ©
Book Delivery Services	Recreation, Leisure, and Continuing Education	19,745	(29%)	136
TOTAL		\$19,745	(29%)	

Chapter V. Coordination, Performance Measures, Strategic Planning Efforts

This chapter is organized as follows:

Section A describes the coordinating mechanisms used by County Government staff to coordinate programs, and identifies programs that deliver similar services;

Section B summarizes the performance measures currently collected and reported, and discusses the limitations of the data; and

Section C highlights recent strategic planning efforts and summarizes feedback from the field concerning the common challenges facing programs designed to serve seniors.

A. Coordination of Programs

The County Government coordinates programs designed to serve seniors through a primary point of contact and referral system, three formal coordination structures, and a regular information dissemination forum.

In addition, OLO observed an *esprit de corp* among program staff in delivering services to seniors. OLO learned of many difficult cases that required the coordination of services delivered by the County Government, non-profit, and private organizations. This type of coordination was primarily achieved through a network of dedicated County Government staff and County residents. OLO observed first-hand the difference that these services make to the lives of senior residents.

1. Primary Point of Contact and Referral

The key to high level of coordination is due (in large part) to the primary point of contact provided through DHHS' Senior Information and Assistance program.¹ Through this program, staff coordinate a wide range of County Government, private and not-for-profit services to help meet a senior's needs. Staff involved with Senior Information and Assistance program must keep abreast of existing services in order to relay current information onto the program's clients.

¹ By federal law (Older Americans Act), the County must provide a Senior Information Assistance Program.

2. Formal Coordinating Structures

a) Senior Initiative Coordinating Group. In October 2004, the Chief Administrative Officer reconstituted the group of County Government staff responsible for creating the Senior Initiative.² The group now meets monthly as the Senior Initiative Coordinating Group and is chaired by an Assistant Chief Administrative Officer.

The Chief Administrative Officer tasked the Senior Initiative Coordinating Group with coordinating the funding, planning, and service delivery of programs designed to serve seniors across County Government. The Group's specific tasks include:

- Improving community outreach and publicity of programs designed to serve seniors;
- Identifying and planning for the short and long term needs of the County's seniors;
- Consolidating and reviewing the FY 06 and FY 07 operating budgets for programs designed to serve seniors across County Government; and
- Establishing an Executive Branch policy that identifies senior issues as a top County Government priority.

Currently, the group's membership includes representatives from the following departments/offices: the Offices of the County Executive; Office of Management and Budget; Health and Human Services; Housing and Community Affairs; Libraries; Public Works and Transportation; Fire and Rescue; Recreation; Police; Economic Development (Workforce Development); Montgomery County Volunteer and Community Services Center; and the Regional Services Centers. The group also includes representatives from the Housing Opportunities Commission and Maryland-National Capital Park and Planning Commission.

Area Agency on Aging and the Interagency Committee on Aging Services.³ By law, the County must establish an Interagency Committee (IAC) on Aging Services. The County's IAC consists primarily of Aging and Disability Services management staff. For the past six years, the Committee met on a bi-weekly bases (and more often when necessary) to integrate and improve the coordination among the State and County programs provided through Aging and Disability Services.

² In January 2001, 13 County agencies/departments/offices worked together to produce The Senior Initiative. Chapter II (page 9) provides a brief summary of the initiatives developed by the group.

³ In 1996, the former Montgomery County Department of Family Resources, Public Health and Addictions, Victims and Mental Health were combined with the Maryland State Department of Social Services to create the Montgomery County Department of Health and Human Services (DHHS). All services provided to seniors by the four departments were combined into DHHS, including the Area Agency on Aging.

The two memorandums of understanding listed below are recent examples of coordination efforts achieved by the Area Agency on Aging and the IAC:

- Memorandum of Understanding between Department of Health and Human Services/Aging and Disability Services/Area Agency on Aging, and Montgomery County Volunteer and Community Service Center to provide a program called Telephone Reassurance for Senior Caregivers. This program recruits volunteers to provide moral support to seniors that care for other seniors, grandchildren, and individuals with development disabilities.
- Memorandum of Understanding with the Department of Health and Human Services' Public Health Service (Licensure and Regulatory Services) concerning Group Senior Assisted Living Monitoring Program. This program assesses the health and safety of residents in assisted living facilities by monitoring compliance with the State regulations.

Aging and Disability Services management staff report that the frequency of meetings decreased in FY 04, due to the resolution of most of the integration issues. Beginning January 2005, the recently reconstituted Senior Initiative Coordinating Group (described on page 34) has become the County's Interagency Committee on Aging Services.

b) Advisory Group for Transportation for Seniors.⁴ The Advisory Group for Transportation for Seniors is the formal coordination structure for the County Government's transportation services to seniors and persons with disabilities. The Team advises the Director of DPWT and the Director of DHHS on transportation policy pertaining to County Government programs.

The team consists of representatives of DPWT's Transit Division, DHHS' Aging and Disability Services, non-profit organizations, the Commission on Aging, and the Commission on Persons with Disabilities.

c) First Transit Group. Established in the early 1990s, this group meets monthly to coordinate the day-to-day operation of DHHS' transportation program called Program Transportation. The group consists of staff from DHHS, and DPWT, and Department of Recreation. The group consists of representatives of DPWT's Transit Division, Aging and Disability Services, and Recreation's Senior Programs. Examples of items discussed include transportation routes and schedules, and procedures for dealing with difficult persons.

⁴ Formerly known as the Paratransit Management Team.

3. Information Dissemination Forums

Commission on Aging. Establish by County law in 1974, the Commission on Aging consists of 25-members appointed by the County Executive and confirmed by the County Council. The Commission's primary role is to advise the County Government on policies and programs that affect the county's senior population. However, the Commission also provides a forum for County Government staff to disseminate program information.

At each monthly meeting, representatives from Health and Human Services, Libraries, Recreation, Public Works and Transportation, as well as the Housing Opportunities provide the Commission with an update of program activities. At these meetings, County Government staff remain informed of new initiatives, changes to funding and services, and other issues that may affect programs designed to serve seniors.

In addition, the **Senior Services Network** (formerly known as the Providers Network) was established by the County 25 years ago to share information among public and private providers of services to seniors. Grass Roots Organization for the Well-Being of Seniors (GROWS) now manages the group. The group meets the first Thursday (October through June) at the Holiday Park Senior Center. According to GROWS members, over 75 professionals (from the public, private, and non-profit sectors) attend the meeting.

Programs that Provide Similar Services to Seniors

OLO identified a number of programs that provide similar services to seniors in the areas of transportation, counseling, and community education. In general, the programs identified are reasonably well coordinated among staff to avoid duplication of efforts.

Transportation Programs. DHHS' Aging and Disability Services provides three transportation programs for seniors by way of contract: Program Transportation; The Senior Connection; and Escorted Transportation. Program Transportation provides transportation to senior centers, neighborhood senior programs, and grocery stores. The Senior Connection is a non-profit organization that provides transportation to seniors in Bethesda/Chevy Chase and Silver Spring (including Leisure World) regions. Escorted Transportation uses private vendors to transport seniors (who are clients of Aging and Disability Services) to medical and other appointments.

Similarly, DPWT provides three transportation programs for seniors: Call 'N Ride, Connect-A-Ride; and Ride On's discounted fare for seniors. Call 'N Ride offers taxicab coupons, on a sliding fee scale, to low-income seniors. DPWT contracts with the Jewish Council for the Aging to operate the Connect-A-Ride (CAR) Program; which connects seniors to public, private, and volunteer transportation providers in the County. The County's Ride On buses also offer discounted fares for seniors.

Education and Outreach. Montgomery County's Police Department (MCPD) and Montgomery County Fire and Rescue Service (MCFRS) provide education and outreach programs for seniors. MCPD's program educates seniors on crime prevention and MCFRS' program educates seniors on fire and accident prevention. Both departments offer these education programs at senior and community centers, nursing homes, assisted living facilities, and other congregate sites.

Counseling Services for Seniors. DHHS' Behavioral Health and Crisis Services and the Montgomery County Volunteer and Community Services Center provide counseling services for seniors. DHHS Peer Counseling Program (part of the Mental Health Seniors Program) recruits volunteer seniors to counsel other seniors who are experiencing mild mental health problems.

The Montgomery County Volunteer and Community Services Center's Telephone Reassurance Program recruits volunteers to provide moral support to seniors that care for other seniors, grandchildren, and individuals with development disabilities.⁵

B. Program Performance Measures

Each program summary in Appendix A contains the performance measures compiled by individual program managers for past three fiscal years. 18 of the 31 programs designed to serve seniors publish program activity data through *Montgomery Measures Up!*.⁶ Each program that participates in *Montgomery Measures Up!* reports the following performance measurement data.

- **Workload/Outputs** -- primarily measure the number of seniors served;
- **Outcomes/Results** -- show how successful the program is at serving seniors;
- **Service Quality** -- presents data that indicates the program's accuracy, timeliness, and client satisfaction; and
- **Efficiency** -- examines the ratio between resources and workload.

The table on the following page shows the programs that do (and do not participate) in *Montgomery Measures Up!*. Performance measurement data for the programs that do not participate in *Montgomery Measures Up!* still track performance data. However, the data are primarily limited to workload/outputs.

⁵ Peer Counseling volunteers are seniors who work with other seniors under the care of a mental health professional. The telephone Reassurance Program does not require the use of senior volunteers and the clients are not necessarily receiving mental health services.

⁶ The Office of Management and Budget's *Montgomery Measures Up!* document provides detailed information on the performance of Montgomery County's programs and services. Each program in the document contains input, output, outcome, service quality, and efficiency measures.

Limitations of Current Performance Measures

The performance measures for programs that serve seniors as well as other target groups (e.g., adults with disabilities and low-income residents) do not distinguish between the target groups. Therefore, the number of seniors served and the associated program resources (e.g., expenditure and workyears) are not easily identifiable. For the purposes of this study, program staff spent considerable time reviewing data to estimate the proportion of clients that are seniors. OLO used this proportion to prorate the performance measures.

In addition, the programs do not routinely publish the known current demand for services. However, as part of day-to-day operations, program staff do keep up-to-date wait lists. For example, as of September 30, 2004, Aging and Disability Services had 130 applicants on the wait list for personal care services, and 80 applicants on the wait list for chore services.

**Table 9
Programs Designed to Serve Seniors that do (and do not) Participate in
Montgomery Measures Up!**

Programs that Participate in Montgomery Measures Up!	Programs that do not Participate in Montgomery Measures Up!
<p>Health and Human Services</p> <ul style="list-style-type: none"> • Adult Protective Services • Adult Evaluation & Review Services • Social Services to Adults • Guardianship Program • Adult Foster Care • Ombudsman • In-Home Aide Services • Senior Food Program • Senior Information and Assistance • Medical Assistance/Long Term Care • Senior Community Program Services • Respite Care • Small Assisted Living Facilities • Nursing Homes • Domiciliary Care Homes • Dental Services • Mental Health Services for Seniors <p>Public Works and Transportation</p> <ul style="list-style-type: none"> • Ride On* <p>Recreation</p> <ul style="list-style-type: none"> • Senior Programs 	<p>Public Works and Transportation</p> <ul style="list-style-type: none"> • Call 'N Ride • First Transit • Senior/Disabled Community Outreach Program <p>MC Volunteer and Community Service Center</p> <ul style="list-style-type: none"> • Retired & Senior Volunteer Program • Telephone Reassurance Program <p>Housing and Community Affairs</p> <ul style="list-style-type: none"> • Home and Housing Initiative Fund • Public Service Grants <p>Police Department</p> <ul style="list-style-type: none"> • Elder Abuse Unit • Community Outreach <p>Fire and Rescue Services</p> <ul style="list-style-type: none"> • Fire & Rescue Senior Outreach <p>Office of the County Attorney</p> <ul style="list-style-type: none"> • Child & Adult Protective Services Unit <p>Libraries</p> <ul style="list-style-type: none"> • Book Delivery Services (Homebound Seniors/ Nursing Homes)

* Data pertaining to seniors is part of the larger pool of Ride On data.

Source: OLO and Montgomery Measures Up!, November 2004

C. Recent Strategic Planning Efforts

OLO's research indicates that there is no strategic plan across the programs designed to serve seniors. Further, only one program (DHHS' Senior Dental Services) has an individual strategic plan.⁷

However, in December 2002, DHHS' Aging and Disability Services contracted with Towson University to conduct a Strategic Planning Study. The study primarily forecasted the demands seniors will place on Aging and Disability Services. Chapter II summarizes the study's findings and recommendations.

In addition, in January 2004, GROWS (Grass Roots Organization for the Well-Being of Seniors) released a white paper titled *A Call for Action on the Growth of Montgomery County's Aging Population*.⁸ GROWS believes that there is an enormous wave of senior needs approaching and to meet the anticipated increased demand for services, the County should develop a comprehensive strategic plan. GROWS anticipates that the plan would take two years to develop at an estimated cost of \$500K.

Feedback from the Field

As part of the process of compiling of programs designed to serve seniors, OLO asked program staff to identify future challenges facing their program. This chapter highlights several common challenges among the programs. Each program write-up contained in Appendix A provides the specific challenges and improvement strategies.

1. Anticipated Growth in the Senior Population

The most common cited challenge facing programs designed to serve seniors is the expected increase in the County's senior population and anticipated growth in service needs.

As reported in Chapter II, approximately 98,000 or 11% of Montgomery County's residents are 65 years and older. By 2030, it is estimated that this cohort of seniors will increase to 186,968 individuals and account for 17% of the County's residents.

⁷ The Department of Libraries' Director reports that the library system will be developing a new strategic plan for the library system in 2005. The Director reports services to seniors will be discussed as part of the strategic planning process. In addition, the Department of Recreation's strategic plan contains additional space dedicated for seniors in all new recreation centers.

⁸ According to GROWS literature, the organization was founded by individuals who saw gaps in senior services and wanted to take action to improve the quality of life of seniors in the County. GROWS incorporated as a not-for-profit 501 (c) 3 organization in 1992.

Recent studies show that due to the growth in the County's senior population, Aging and Disability Services programs can expect a 65% growth in service needs by 2030.⁹ Given this forecast, program staff express concern about meeting future workloads, especially if there is no corresponding increase in resources.

2. Decreased Funding for Select Programs

Chapter IV of this report shows that the overall funding for programs designed to serve seniors increased – in aggregate – by 23% from FY 03 to FY 05. However, some programs experienced a decrease in funding in the past three years; primarily programs delivered through DHHS' Aging and Disability Services. Reasons for this decrease include the:

- Reduction in non-County funding;
- Reduction in County tax dollars due to County Government cost savings initiatives; and
- Reallocation of resources to other programs designed to serve seniors.

County Government staff express concern about meeting current and future workloads, if the trend of decreasing resources continues. The table on the following page lists the programs that experienced a decrease in funding between FY 03 and FY 05.

⁹The projections were reported in the County Council's FY 02 Intensive Budget Review. The data in FY 02 IBR was compiled by M-NCPPC's Research Division (at the request of Aging and Disability Services).

Table 10
Programs that Experienced a Decrease in Funding: FY 03 – FY 05

Department	Program	Percent Decrease
Health and Human Services (Aging and Disability Services)*	Adult Protective Services	4%
	Adult Evaluation & Review Services	7%
	Social Services to Adults	3%
	Guardianship Program	8%
	In-Home Aide Services	4%
	Assisted Living Services	3%
Montgomery County Police Department	Elder Abuse Unit (Police)	4%
Montgomery County Public Libraries	Book Delivery Services (Homebound Seniors and Nursing Homes)	29%
Housing and Community Affairs	Public Service Grants**	10%

* Aging and Disability Services staff report that the reductions are primarily due to the reallocation of staff to the Medicaid Waiver for Older Adults program. **Four non-profit organizations received Public Service Grants to support the delivery of programs that serve seniors (see © 101 for details).
 Source: OLO and County Government Staff, November 2004

3. Limited Mental Health Services for Seniors

According to the U.S. Surgeon General’s Report on Mental Health (1999), almost 20% of persons 55 years and older experience specific mental disorders that are not part of “normal aging.”¹⁰ Extrapolating on the Surgeon General’s data, approximately 20,000 seniors in the County currently could have a mental health disorder. In FY 04, DHHS’ Mental Health Services for Seniors program provided mental health services to approximately 800 low-income seniors.

OLO heard the need to improve the system of mental health services to seniors. Program staff report difficulty matching clients with treatment services, and staff also express frustration with the inability of finding housing for clients with mental health disorders. Program staff recommend that the system needs to address:

- The disparate reimbursement rate for mental health services under Medicare;
- The lack of outpatient treatment services for seniors; and
- The lack of dedicated assisted living facilities for seniors with mental health disorders.

¹⁰ Source: U.S. Department of Health and Human Services (USDHHS), (1999), *Mental Health: A Report of the Surgeon General*. Rockville, MD. U.S. Department of Health and Human Services, Substance Abuse and Mental Health Services Administration, Center for Mental Health Services. National Institutes of Health, National Institute of Mental Health.

4. A Different Generation of Seniors

In the year 2011, the first wave of baby boomers will reach 65. Gerontologists predict that the current paradigm of retirement and aging defined by the golden generation will most likely not apply to baby boomers. Several program staff cite a recent report published by Harvard's School of Public Health, which states that baby boomers will likely reinvent aging.¹¹ The report states that:

Baby boomers have a higher level of education than the pre-boom cohort. They are more likely to continue working longer. They are in their peak earning years, more likely to exercise than their elders, and are regular users of the internet. The baby boomer cohort is ethnically and economically diverse, and the degree of economic security it will enjoy in later years is yet to be determined (Reinventing Aging – Baby Boomers and Civic Engagement Pg 57).

Several program staff suggest that the County should reach out to persons in their 50s to gauge what the future holds and prepare accordingly. Program staff also express concern about balancing the needs of younger seniors and the frail and vulnerable elderly.

¹¹ Reinventing Aging – Baby Boomers and Civic Engagement, School of Public Health (Harvard), June 2004.

Chapter VI. Summary of Findings

This chapter presents the Office of Legislative Oversight's findings. It is organized to parallel the sequence of chapters in the report.

BACKGROUND

Finding #1: Approximately 98,000 or 11% of Montgomery County's residents are 65 years and older. By 2030, it is estimated that this cohort of seniors will increase to 186,968 individuals and account for 17% of the County's residents.

As of this writing, 2000 United States Census Bureau data remain the most comprehensive source of demographic information on seniors living in Montgomery County. According to United States Census data (2000):

- The number of residents 65 years and older is expected to increase from approximately 98,000 in 2000 to 186,968 in 2030. By 2030, seniors will represent 17% of the County's population.
- 32% of seniors 75 years and older live in one-person households; meaning 15,000 County residents over 75 years of age live alone.
- Nearly one-third (31%) of County seniors reported some type of sensory, physical, and/or mental disability. Of those who reported a disability, 63% are females.

Finding #2: In recent years, the Council has received nine reports related to seniors. The reports have contributed to the public policy debate concerning seniors.

During the past five years, multiple studies received by the Council echo the news contained in the Census data estimates, with predictions that that the number of County residents aged 65 and older will increase significantly. The different reports offer a variety of recommendations on what the County Government needs to do to meet the needs of its older residents.

Various Council Committees have reviewed many of the reports, which have helped shape the public policy debate concerning seniors.

SELECTION AND CATEGORIZATION OF PROGRAMS

Finding #3: Compiling the inventory of programs designed to serve seniors and determining the total costs and revenues was challenging because:

- **There is no universal definition of a “senior” and**
- **Actual expenditures, revenues, and performance measurement data for seniors are not readily available for all programs.**

Eligibility for the range of County Government programs designed to serve seniors varies by program to program. For some programs, age is only one eligibility criterion considered; the other primary criterion is income. For many programs, state and federal law mandates the age eligibility criteria. For other programs, County Government policies and procedures govern the age threshold. For programs that also serve adults of all ages, OLO adopted the Older Americans Act definition that an individual qualifies as a senior if he/she is 60 years and older.

Many of the programs that serve seniors also serve adults with disabilities and residents of low income. For these programs, data that distinguish expenditures, revenues, and program performance solely related to seniors are not readily available.¹ Also, several programs do not have individual program budgets because they fall within larger budget categories. In addition, information is not readily available to determine how reimbursements from the federal government decrease the burden of County tax dollars at the program level.²

¹ OLO worked with program staff to estimate the proportion of seniors served by these programs. The estimate was used to prorate program funding for many of the programs listed in Appendix A.

² A proportion of the County’s funding for DHHS programs designed to serve seniors is eligible for Federal Financial Participation (FFP) reimbursement. Department staff report that FFP reimbursement is tracked on a macro basis, and is not easily identifiable by program because of the complexity, scope, and requirements of the Department’s Federal claim.

INVENTORY AND FISCAL ANALYSIS³

Finding #4: In FY 05, the Council appropriated an estimated \$32 million to support 31 programs designed to serve seniors.⁴ This represented \$5.9 million (23%) more than the FY 03 spending level.

In FY 05, an estimated \$32 million for programs designed to serve seniors was appropriated among multiple County Government departments/offices as follows:

- \$18.1 million (58%) to the Department of Health and Human Services;
- \$8.2 million (25%) to the Department of Housing and Community Affairs;
- \$3.7 million (11%) to the Department of Public Works and Transportation; and
- \$1.4 million (4%) to the Department of Recreation.

The remaining \$498K (2%) was appropriated among five departments/offices: Montgomery County Police Department (\$207K); Montgomery County Volunteer and Community Services Center (\$121K); Montgomery County Fire and Rescue Service (\$115K); the Office of the County Attorney (\$35K); and Montgomery County Public Libraries (\$20K).

Finding #5: County funds constitute approximately \$24 million or 75% of the FY 05 appropriation. Non-County funding accounts for approximately 25%.

Of the \$32 million appropriated in FY 05, County funds account for approximately \$24 million or 75% of FY 05 expenditures. The \$8 million in outside funds are primarily state and federal grants. The County's share of funding increased 30% between FY 03 and FY 05. The amount of non-County funding increased only 4.5% during the same period.

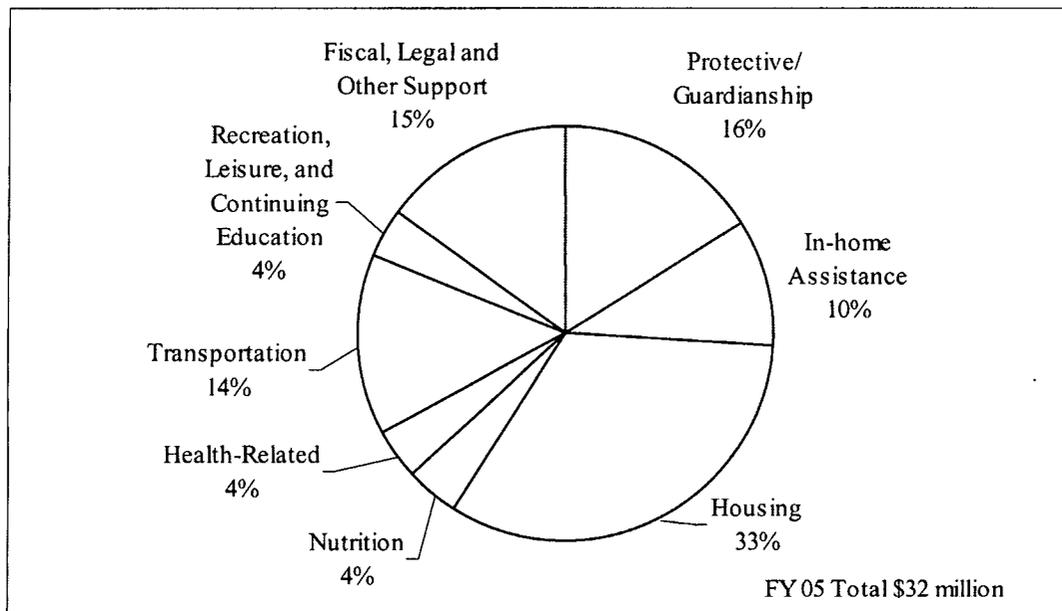
³ Appendix A contains the inventory of programs designed to serve seniors.

⁴ In FY 05, the County Council also appropriated \$130K to the Community Grant's Non-Departmental Account to support non-profit organizations in the delivery of programs that serve seniors. Appendix A (© 7) shows the amount of funding, by organization, provided through this Non-Departmental Account for fiscal years 2003, 2004, and 2005.

Finding #6: Housing programs account for one-third of the FY 05 appropriation. The remaining FY 05 funds are allocated among seven other categories of services to seniors.

The chart below illustrates a break down of the \$32 million of FY 05 funds across eight categories of services to seniors.⁵ Housing programs receive the largest allocation of FY 05 funds; followed by Protective/Guardianship programs. Recreation, Leisure, and Continuing Education programs, Nutrition programs, and Health-Related programs each receive a similar allocation. Appendix A © 4 lists the programs that fall within the eight categories.

Chart 4
Percent Distribution of FY 05 Funds Across Eight Categories of Services to Seniors



Source: OLO, November 2004

⁵ In consultation with County Government staff, OLO identified eight categories of services to seniors. The categories represent the diverse range of services provided by the County Government. The categories are: Protective/Guardianship; In-Home Assistance; Housing; Nutrition; Health-Related; Transportation; Recreation, Leisure, and Continuing Education; and Fiscal, Legal, and Other Support.

Finding #7: Funding for services in all eight categories increased between FY 03 and FY 05.

The table below shows the changes in funding by service category between FY 03 and FY 05. In sum, the data show increased funding in all eight categories of services over the past three fiscal years.

The 44% boost in funding for housing programs represents the largest increase. This increase is primarily due to an injection of \$4 million dollars of County tax money and federal funds in FY 05 into Department of Housing and Community Affairs' Housing Initiative Fund and Home Program for elderly housing projects.

**Table 7
FY 03 to FY 05 Funding Changes for Programs Designed to Serve Seniors by Category**

Category	FY 03 – FY 05	
	Dollar Increase (\$ in 000's)	Percent Increase
Housing	\$3,388	47%
Health-Related	\$ 299	33%
Nutrition	\$ 273	26%
Fiscal, Legal and Other Support	\$ 775	19%
Transportation	\$ 643	17%
Recreation, Leisure, and Continuing Education	\$ 190	16%
Protective/Guardianship	\$ 359	8%
In-Home Assistance	\$ 18	1%
TOTAL	\$5,945	23%

Source: OLO, November 2004

Finding #8: Nine of the 31 programs designed to serve seniors generate revenue. In FY 05, the County Government expects to receive an estimated \$1.9 million in revenue from the nine programs.

The County Government receives revenue through federal, state and hospital reimbursements, and user fees. In FY 05, the County Government expects to receive an estimated \$1.9 million in revenue from programs designed to serve seniors. This represents a one percent increase over FY 03 revenues.

Specifically, five Aging and Disability Services' programs expect to receive \$1.1 million in revenue. Three Public Health Services' nursing home and assisted living facility regulatory programs anticipate receiving approximately \$400K. DPWT's Call 'N Ride program anticipates over \$300K in coupon sales in FY 05.

COORDINATION, PERFORMANCE MEASURES, AND STRATEGIC PLANNING EFFORTS

Finding #9: The County Government's coordination mechanisms sufficiently coordinate programs designed to serve seniors.

The County Government sufficiently coordinates programs designed to serve seniors through a primary point of contact and referral system, three formal coordination structures, and an information dissemination forum. These coordination mechanisms have kept duplication of effort to a minimum.

In addition, OLO found an *esprit de corps* among program staff in delivering services to seniors. OLO learned of many difficult cases that required the coordination of services delivered by the County Government, non-profit, and private organizations. This type of coordination was primarily achieved through a network of dedicated County Government staff and County residents. OLO observed first-hand the difference that these services make to the lives of senior residents.

1. Primary Point of Contact and Referral

The key to the high level of coordination is due (in large part) to the primary point of contact provided through DHHS' Senior Information and Assistance program. Through this program, staff coordinate a wide range of County Government, private and not-for-profit services to help meet a senior's needs. Staff involved with Senior Information and Assistance program must keep abreast of existing services in order to inform seniors with current information.

2. Formal Coordination Structures

County Government staff participate in three formal groups that coordinate programs designed to serve seniors. The three current groups are:

- **Senior Initiative Coordinating Group.** In October 2004, the Chief Administrative Officer reconstituted the Senior Initiative Coordinating Group.⁶ This group consists of 16 high level managers tasked with coordinating the funding, planning, and service delivery among programs across County Government. Beginning 2005, the group will also be the County's Interagency Committee on Aging Services.⁷ An Assistant Chief Administrative Officer chairs the group.

⁶The Chief Administrative Officer originally formed this group in January 2001 to develop the Senior Initiative. Chapter II (on page 9) provides a brief summary of the initiatives developed by the group.

⁷The Interagency Committee on Aging Services is required by law. Prior to 2005, the Committee consisted of Aging and Disability Services program managers who met to improve integration/coordination of Aging and Disability Services. Chapter V (page 33) provides additional information on Interagency Committee on Aging Services.

- **Advisory Group for Transportation for Seniors.**⁸ This group is the County Government's formal coordination structure for transportation programs designed to serve seniors and people with disabilities. The group consists of DHHS and DPWT program managers. The group provides policy guidance to respective department directors.

- **First Transit Group.** Established in the early 1990s, this group meets monthly to coordinate the day-to-day operation of DHHS' transportation program called Program Transportation. The group consists of staff from DHHS, and DPWT, and Department of Recreation.

3. Information Dissemination Forum

Commission on Aging. Established by County law in 1974, the Commission on Aging advises the County Government on policies and programs that affect the county's senior population. The Commission also provides a monthly forum for County Government staff to disseminate program information.

At each meeting, representatives from Health and Human Services, Libraries, Recreation, Public Works and Transportation, as well as the Housing Opportunities provide the Commission with an update of program activities. At these meetings, County Government staff remain informed of new initiatives, changes to funding and services, and other issues that may affect programs designed to serve seniors.

In addition, the Senior Networking Group (formerly known as the Providers Network) was established by the County 25 years ago to share information among public and private providers of services to seniors. Grass Roots Organization for the Well-Being of Seniors (GROWS) now manages the group. The group provides a monthly forum for professionals (from the public, private, and non-profit sectors) to network and discuss senior-related issues.

⁸ Formerly known as the Paratransit Management Team.

STRATEGIC PLANNING EFFORTS AND FEEDBACK FROM THE FIELD

Finding #10: There is no strategic plan across the inventory of programs designed to serve seniors. However, DHHS' Aging and Disability Services completed a strategic planning study for its programs in 2002.

No strategic plan for the inventory of programs designed to serve seniors exists. Further, only one program (DHHS' Senior Dental Services) has an individual strategic plan.⁹

However, in December 2002, DHHS' Aging and Disability Services contracted with Towson University to conduct a Strategic Planning Study for its programs. The study primarily forecasts the substantial pressure an aging population will place on Aging and Disability Services. Other issues affecting services include an increase number of seniors with limited English proficiency, a decrease in affordable housing, and an increase in diseases such as Diabetes and Alzheimer's. Chapter II (page 6) summarizes the report's recommendations.

In addition, in January 2004, GROWS (Grass Roots Organization for the Well-Being of Seniors) released a white paper titled *A Call for Action on the Growth of Montgomery County's Aging Population*.¹⁰ GROWS believes that there is an enormous wave of senior needs approaching and to meet the anticipated increased demand for services, the County must develop a comprehensive strategic plan. GROWS anticipates that the plan would take two years to develop at an estimated cost of \$500K.

Finding #11: OLO heard that programs designed to serve seniors face a number of common challenges:

- **Growth in the senior population and corresponding need for services;**
- **Decrease in funding for select programs;**
- **Limited mental health services for Seniors; and**
- **Unpredictable needs of the next generation of seniors.**

The common challenges facing programs designed to serve seniors, identified by program staff are:

⁹ The Department of Libraries' Director reports that the library system will be developing a new strategic plan for the library system in 2005; services to seniors will be discussed as part of the strategic planning process. In addition, the Department of Recreation's strategic plan contains additional space dedicated for seniors in all new recreation centers.

¹⁰ According to GROWS literature, the organization was founded by individuals who saw gaps in senior services and wanted to take action to improve the quality of life of seniors in the County. GROWS incorporated as a not-for-profit 501 (c) 3 organization in 1992.

Anticipated Growth in the Senior Population. The most common cited challenge facing programs designed to serve seniors is the expected increase in the County's senior population and anticipated growth in service needs. Finding #1 (page 43) of this chapter summarizes the anticipated growth in the County's senior's population.

Decreased Funding for Select Programs. Chapter IV of this report shows that the overall funding for programs designed to serve seniors increased – in aggregate – by 23% from FY 03 to FY 05. However, some programs experienced a decrease in funding in the past three years; primarily programs delivered through DHHS' Aging and Disability Services. Chapter V (page 41) lists the specific programs that experienced a decrease in funding between FY 03 and FY 05. Reasons for this decrease include the: reduction in non-County funding; reduction in County tax dollars due to County Government cost savings initiatives; and reallocation of resources to other programs designed to serve seniors. County Government staff express concern about meeting current and future workloads, if the trend of decreasing resources continues.

Limited Mental Health Services for Seniors. OLO heard the need to improve the system of mental health services to low-income seniors. Program staff report difficulty matching clients with treatment services, and staff also express frustration with the inability of finding housing for clients with mental health disorders. Program staff recommend that the system needs to address: the disparate reimbursement rate for mental health services under Medicare; the lack of outpatient treatment services for seniors; and the lack of dedicated assisted living facilities for seniors with mental health disorders.

A Different Generation of Seniors. In the year 2011, the first wave of baby boomers will reach 65. Gerontologists predict that the current paradigm of retirement and aging defined by the golden generation will most likely not apply to baby boomers. Several program staff suggest that the County should reach out to persons in their 50s to gauge what the future holds and prepare accordingly. Program staff also express concern about balancing the needs of younger seniors and the frail and vulnerable elderly.

Finding #12: Only eighteen of the 31 County Government programs designed to serve seniors publish program activity data in *Montgomery Measures Up!*.¹¹

For each of the 18 programs that participates in *Montgomery Measures Up!*, program staff track and report workload/outputs, outcomes/results, service quality, efficiency, and inputs (expenditures and workyears). Chapter V (page 38) lists the programs that do (and do not) participate in *Montgomery Measures Up!*. Performance measurement data for the other 13 programs that do not participate in *Montgomery Measures Up!* are generally limited to workload/outputs.

¹¹ The Office of Management and Budget's *Montgomery Measures Up!* document provides detailed information on the performance of Montgomery County's programs and services. Each program in the document contains input, output, outcome, service quality, and efficiency measures.

Although an invaluable source of information for this study, OLO identified a number of limitations to current performance measures presented in *Montgomery Measures Up!* for programs designed to serve seniors. These limitations include: no distinction of performance measures for programs that serve seniors as well as adults with disabilities and residents of low-income, and no routine publication of the known number of seniors waiting for a program's services.

Chapter VII. Recommendations

United States Census data (2000) indicates that approximately 98,000 or 11% of Montgomery County's residents are 65 years and older. By 2030, it is estimated that this cohort will increase to 186,968 individuals and account for 17% of the County's residents.¹

During the past five years, multiple studies received by the Council echo the news contained in the Census data estimates, with predictions that the number of County residents aged 65 and older will increase significantly. The different reports offer a variety of recommendations on what the County Government needs to do to meet the needs of its older residents.

This Office of Legislative Oversight (OLO) report adds new information to the portfolio of completed studies related to the County's senior residents. Specifically, it:

- Compiles an inventory of County Government programs designed to serve seniors;
- Estimates the total cost and total revenues for the inventory of programs;
- Assesses the adequacy of the coordination among the different programs; and
- Describes recent strategic planning efforts and summarizes feedback from the field concerning the common challenges facing programs designed to serve seniors.

OLO's recommendations aim to position the Council and other officials in the County to make fully informed resource allocation decisions about funding programs designed to serve seniors. If endorsed, the package of recommendations will provide key decision-makers a better understanding of how well the many existing programs meet the current and future needs of the County's senior residents.

In sum, OLO recommends the Council request a combination of Legislative and Executive Branch staff to complete the following tasks within the next year:

- An expansion of the inventory of programs designed to serve seniors to include programs offered by other public sector entities as well as those sponsored outside of the public sector by non-profit and private organizations; and
- An objective assessment of how well the completed inventory of public, non-profit, and private sector programs meets the existing and future needs of County's seniors.

OLO also recommends that the Council request the Chief Administrative Officer to present a report to the Council every other year, that: (1) updates the comprehensive inventory of programs designed to serve seniors; and (2) assesses the progress made toward meeting the needs of the County's seniors. Institutionalizing this type of reporting should help sustain a process of making fully informed and needs-based resource allocation decisions about funding programs designed to serve the County's senior residents.

¹ Source: M-NCPPC's Research Division (based on latest Population and Housing Forecast data (Rnd 6.4a).

Recommendation #1:

Complete the inventory of programs designed to serve seniors in the County by asking:

- **Legislative Branch staff to work with other County and bi-County agencies and the cities of Rockville, Gaithersburg, and Takoma Park to compile the details on their respective programs designed to serve seniors.**
- **The Chief Administrative Officer to work with representatives of non-profit and private organizations to compile a list of the major programs designed for seniors that operate outside the public sector.**

The scope of OLO's assignment was limited to a study of County Government's programs designed to serve seniors. To provide a more complete picture of services in the County, the Council should request an expansion of the inventory to include programs provided by all public entities as well as by private and non-profit organizations. OLO recommends that the Council aim for information that parallels the format used in this study.

Expand the inventory to include all public sector programs in the County designed to serve seniors. During the course of this study, OLO learned that other public sector agencies offer programs/services designed to serve seniors. These agencies include: the Housing Opportunities Commission, Montgomery College, M-NCPPC, MCPS, City of Rockville, City of Gaithersburg, and the City of Takoma Park. OLO recommends the Council assign Legislative Branch staff the task of working with these other public sector entities to expand the inventory to include their programs designed to serve seniors.

Expand the inventory to include major programs designed to serve seniors in the County that are offered by the private and non-profit sectors. As the number of senior residents increases, the private and non-profit sectors will continue to play an important role in the delivery of services to seniors. The County Government should identify and include the services offered by the private and non-profit sectors in the inventory of programs/services designed to serve seniors.

To facilitate progress on this step in calendar year 2005, the Council should request that the Chief Administrative Officer (CAO) work with representatives from the non-profit and private sectors to compile this portion of the inventory. The Council should also request that the CAO to identify the estimated cost and timeframe to complete this task.

Recommendation #2:

Request the Chief Administrative Officer to conduct an objective needs assessment that quantifies the extent to which the comprehensive inventory of public, non-profit, and private sector programs meets the existing and future needs of County seniors.

Completion of the inventory of programs provided by the public, non-profit, and private sectors does not answer the question of whether these services adequately meet the needs of the County's senior residents. Comparing the comprehensive inventory of services against the existing and future needs of the senior population is the next logical step.

OLO recommends that the Council request the Chief Administrative Officer to conduct a needs assessment that identifies the known and unknown demand for services based (to the extent feasible) on data that objectively quantifies the outstanding needs. The assessment should include a plan that:

- Identifies and quantifies service gaps;
- Recommends an order of priority for closing the service gaps identified;
- Recommends whether the public sector, non-profit sector, private sector (or some combination) is in the best position to efficiently and effectively fill the gaps in services; and
- Provides estimates of the fiscal impact of addressing the gaps identified.

The Council should request that the CAO to identify the estimated cost and timeframe to complete this task.

Recommendation #3:

Request the CAO to present a report to the Council every other year, that updates the comprehensive inventory of programs designed to serve seniors and assesses the progress made toward meeting the needs of the County's seniors.

Given the projected increases in the number of County seniors over the next 25 years, the Council should expect that service needs for this population will continue to grow. To provide the Council with the information to make comprehensive and needs-based budget decisions going forward, the Council should request the Chief Administrative Officer to present a report to the Council every other year that updates the comprehensive inventory of programs designed to serve seniors and assesses the progress made toward meeting the needs of the County's seniors.

The bi-annual report should include:

- Current demographic trends/statistics on the County's senior population;
- An update to the inventory of programs designed to serve seniors;
- An update to the needs assessment; and
- A description of any plans for new programs and changes to existing programs to meet the changing needs of the County's seniors.

CHAPTER VIII. Agency Comments on Final Draft of Report

The Office of Legislative Oversight circulated a final draft of this report to the Chief Administrative Officer (CAO) and relevant Executive Branch departments. The written comments received on the draft report from the CAO are included in their entirety, beginning on the following page.

OLO appreciates the time taken by Executive Branch staff to review and comment on the draft report. OLO's final report incorporates the technical corrections provided by agency staff.



OFFICES OF THE COUNTY EXECUTIVE

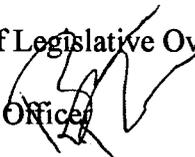
Douglas M. Duncan
County Executive

Bruce Romer
Chief Administrative Officer

MEMORANDUM

January 28, 2005

TO: Karen Orlansky, Director, Office of Legislative Oversight

FROM: Bruce Romer, Chief Administrator 

SUBJECT: OLO Report 2005-3, Inventory of Senior Services

I want to commend the Office of Legislative Oversight (OLO), and in particular Mr. Scott Brown, upon completion of Report 2005-3 "An Inventory of County Government Programs Designed to Serve Seniors." This comprehensive and detailed listing of senior-related programs will educate all stakeholders about the current array of services provided and serve as a baseline against which to measure the impact of future policy and budget decisions.

All executive staff involved in this study reported Mr. Brown's research was conducted in a highly professional, thorough and collaborative manner. Due in large measure to this level of professional collaboration, there are no points of substantive controversy in the report findings or analysis. (Corrections of a technical nature have been provided directly to Mr. Brown.)

Regarding the study recommendations, I urge that the following be considered:

Recommendation #1: Complete the inventory of programs serving seniors to include other County agencies, municipalities, and the private for-profit and non-profit organizations.

To the extent possible, this goal will be accomplished in conducting an assessment of the current and future needs of the County's senior population (Recommendation #2) and the service systems' capacity for addressing these needs (i.e. gap analysis). One must be mindful of the fact that while the continuum of County sponsored services for seniors have remained relatively intact, the emergence and disappearance of service providers in the private sector is constantly changing; any inventory, therefore, will at best be a snap shot of often little utility for consumers and providers.

Recommendation #2: Conduct an objective needs assessment of the extent to which the inventory of senior services meets the existing and future needs of seniors.

The County Executive has listened carefully to the request of the Commission on Aging for such a plan as well as to other senior advocacy organizations (e.g. GROWS). Contingent on the County's fiscal situation, it is the Executive's intent to recommend FY 2006 funding for a long range assessment of the needs of County seniors in order to better prepare ourselves to meet these needs.

Recommendation #3: That the CAO report to the Council every other year an updated inventory of senior programs and assess progress toward meeting the needs of seniors.

Given the incremental changes that occur in population size, budgets, performance measures and other indices of interest, it is the position of the Executive branch that a two-year interval between such reports will yield data of little practical significance. I, therefore, am recommending that the Executive branch staff report this information to Council every five years. A five year interval will allow meaningful trend analysis to be conducted. Of course, in the intervening years on an annual basis Executive department staff will continue to provide Council with fiscal, performance, outcome and other relevant indices (e.g. waiting list).

Again, on behalf of the County Executive staff, my appreciation to OLO for providing us with this very useful report which will serve for our future collaboration in ensuring that the current and future needs of Montgomery County seniors are met.

BR:tm