

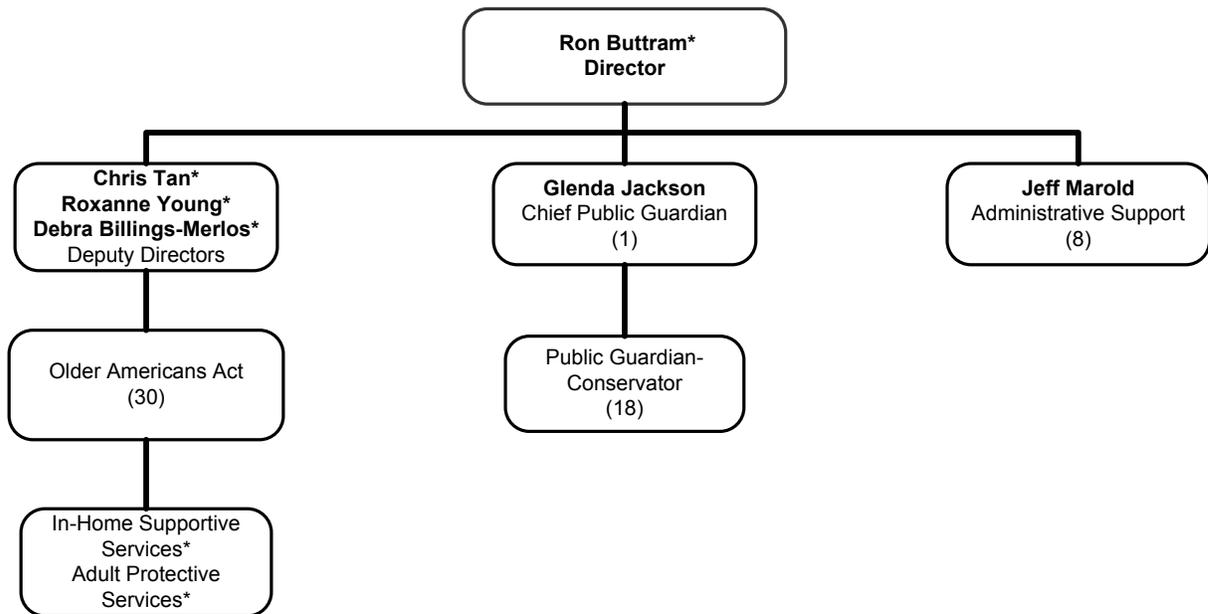
## AGING AND ADULT SERVICES Ron Buttram

### DEPARTMENT MISSION STATEMENT

*The Department of Aging and Adult Services (DAAS) provides services to seniors, at-risk individuals, and adults with disabilities to improve or maintain choice, independence, and quality of life so they may age in place in the least restrictive environment.*



### ORGANIZATIONAL CHART



\*Staffing is reimbursed by the Human Services Administrative Claim budget unit

### 2013-14 ACCOMPLISHMENTS

- Established a mentoring program to educate and expose DAAS staff to other programs within the department other than their current assignment.
- Received 2013 National Association of Counties (NACo) Achievement Award for establishing a program that eliminates In-Home Supportive Service (IHSS) providers wage overpayment due to the late reporting of a recipient's death.
- Provided a total of 690,391 congregate meals served in senior centers throughout the County and home-delivered meals to homebound seniors.
- Established a Facebook page creating a portal for seniors and others to interface with DAAS.
- Contacted 13,726 individuals providing information on services available to seniors.
- Provided outreach and education presentations to 129,199 seniors.
- Distributed 2,250 Farmer's Market coupons to seniors totaling \$45,000 worth of fresh fruits and vegetables.
- Distributed bus passes to 1,400 seniors totaling over 50,000 one-way bus rides.
- Assisted with 2,600 Home Energy Assistance Program (HEAP) applications for \$650,000 in utility credits for seniors.



- Established a quarterly Family Support Group in Public Guardian.
- Investigated and resolved 1,450 complaints in long-term facilities through the Ombudsman Program.
- The Central Intake Unit assisted over 93,000 IHSS care provider requests regarding their paychecks.
- Implemented innovative “We Can! Steps to Healthier Aging, Eat Better & Move More” six week program combining a curriculum focused on healthy eating and physical activity in partnership with the Department of Public Health’s Nutrition program at 12 community centers throughout the County.
- Assisted over 21,000 County residents by providing In-Home Supportive Services to them so they could remain safely in their own home.

**COUNTY GOALS AND OBJECTIVES AND DEPARTMENT PERFORMANCE MEASURES**

**COUNTY GOAL: IMPROVE COUNTY GOVERNMENT OPERATIONS**  
**Objective(s):** • *Monitor and evaluate operations and implement strategies to continually improve efficiency and effectiveness.*

*Department Strategy:* • *Ensure Public Guardian provides timely and accurate financial support to conservatees.*

Measurement	2012-13	2013-14	2013-14	2014-15
	Actual	Target	Actual	Target
Percentage of conservatees' bills paid within 10 days of receipt.	82.9%	87%	94.5%	87%

**COUNTY GOAL: PROVIDE FOR THE HEALTH AND SOCIAL SERVICES NEEDS OF COUNTY RESIDENTS**  
**Objective(s):** • *Maximize the utilization of Federal and State programs and funding to address the needs of County residents.*

*Department Strategy:* • *Enhance senior safety and independence by connecting customers with community resources.*  
 • *Provide in-person response within 24 hours to emergency Adult Protective Services (APS) referrals, including intake, intervention, and/or reports of life threats or crises.*

Measurement	2012-13	2013-14	2013-14	2014-15
	Actual	Target	Actual	Target
Number of customers contacted by Senior Information and Assistance staff.	13,726	12,635	17,869	13,267
Percentage of emergency APS referrals responded to within 24 hours.	99.4%	100%	100%	100%



**SUMMARY OF BUDGET UNITS**

2014-15						
	Requirements	Sources	Net County Cost	Fund Balance	Net Budget	Staffing
<b>General Fund</b>						
Aging and Adult Services	8,926,323	8,926,323	0			38
Public Guardian-Conservator	814,564	202,951	611,613			19
Total General Fund	9,740,887	9,129,274	611,613			57
<b>Total - All Funds</b>	9,740,887	9,129,274	611,613	0	0	57

**5-YEAR REQUIREMENTS TREND**

	2010-11	2011-12	2012-13	2013-14	2014-15
Aging and Adult Services	10,746,636	9,239,446	10,269,763	9,537,346	8,926,323
Public Guardian-Conservator	540,738	644,683	950,961	932,921	814,564
<b>Total</b>	<b>11,287,374</b>	<b>9,884,129</b>	<b>11,220,724</b>	<b>10,470,267</b>	<b>9,740,887</b>

**5-YEAR SOURCES TREND**

	2010-11	2011-12	2012-13	2013-14	2014-15
Aging and Adult Services	9,562,605	9,239,446	10,269,763	9,537,346	8,926,323
Public Guardian-Conservator	353,153	232,984	325,663	286,850	202,951
<b>Total</b>	<b>9,915,758</b>	<b>9,472,430</b>	<b>10,595,426</b>	<b>9,824,196</b>	<b>9,129,274</b>

**5-YEAR NET COUNTY COST TREND**

	2010-11	2011-12	2012-13	2013-14	2014-15
Aging and Adult Services	1,184,031	0	0	0	0
Public Guardian-Conservator	187,585	411,699	625,298	646,071	611,613
<b>Total</b>	<b>1,371,616</b>	<b>411,699</b>	<b>625,298</b>	<b>646,071</b>	<b>611,613</b>



## Aging and Adult Services

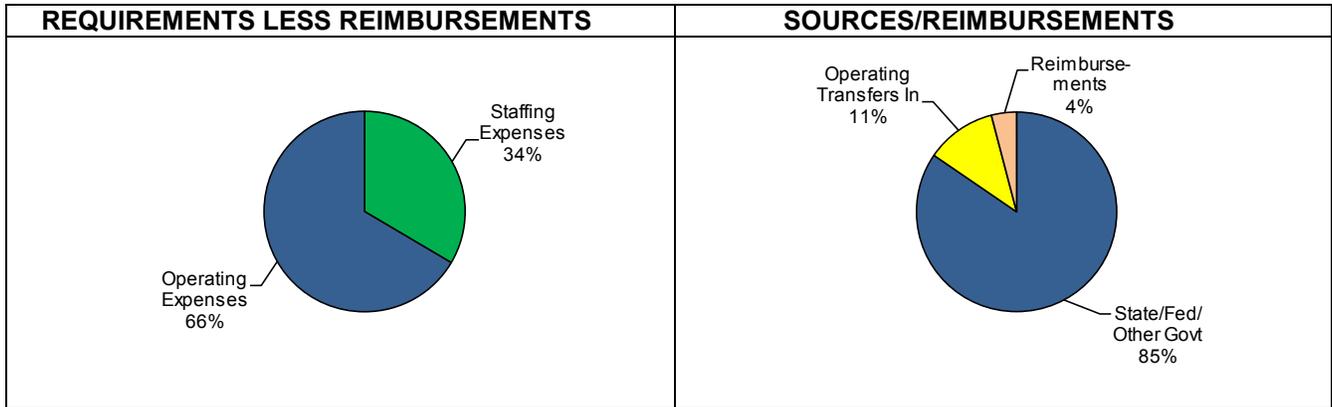
### DESCRIPTION OF MAJOR SERVICES

The Department of Aging and Adult Services (DAAS), under the direction of the California Department of Aging (CDA), serves as the federally designated Area Agency on Aging (AAA) for the County of San Bernardino and is responsible for administering programs under the Older Americans Act (OAA).

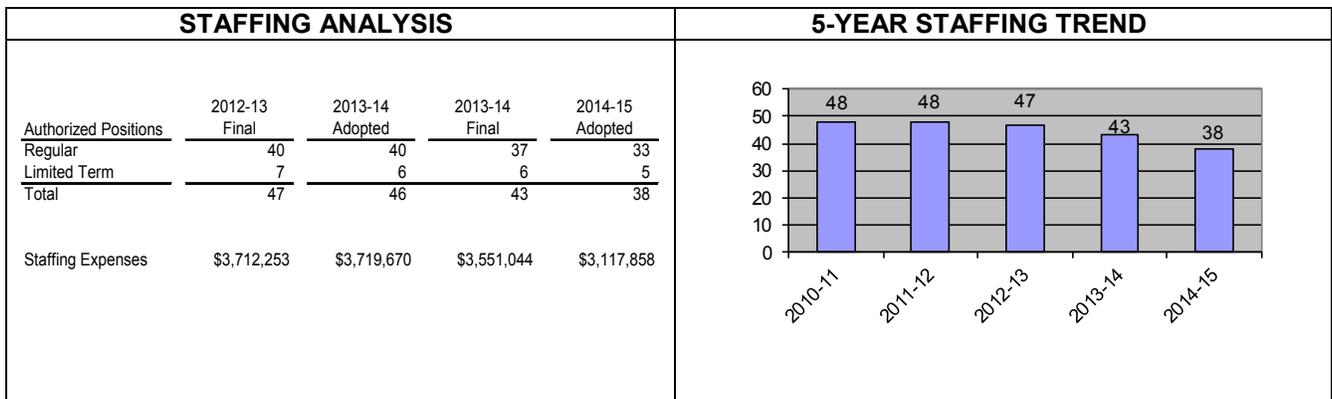
Budget at a Glance	
Requirements Less Reimbursements*	\$9,304,666
Sources/Reimbursements	\$9,304,666
Net County Cost	\$0
Total Staff	38
Funded by Net County Cost	0%
<small>*Includes Contingencies</small>	

The Department works to ensure options are easily accessible to all older individuals and to have a visible resource where seniors can go or call for information. Programs offered by the Department include Senior Information and Assistance (SIA), Elderly Nutrition Program, Senior Community Service Employment Program (SCSEP), Senior Supportive Services, Health Insurance Counseling and Advocacy Program (HICAP), Family Caregiver Support Program (FCSP), Multipurpose Senior Services Program (MSSP), and Long-Term Care Ombudsman (OMB).

### 2014-15 ADOPTED BUDGET



### BUDGETED STAFFING



**ANALYSIS OF 2014-15 ADOPTED BUDGET**

GROUP: Human Services  
 DEPARTMENT: Aging & Adult Services  
 FUND: General

BUDGET UNIT: AAF OOA  
 FUNCTION: Public Assistance  
 ACTIVITY: Administration

	2010-11 Actual	2011-12 Actual	2012-13 Actual	2013-14 Actual	2013-14 Final Budget	2014-15 Adopted Budget	Change From 2013-14 Final Budget
<b>Requirements</b>							
Staffing Expenses	3,517,741	3,428,338	3,401,839	3,280,439	3,551,044	3,117,858	(433,186)
Operating Expenses	7,497,366	6,297,267	6,344,441	5,806,596	6,782,009	6,186,808	(595,201)
Capital Expenditures	0	0	0	0	0	0	0
Contingencies	0	0	0	0	0	0	0
Total Exp Authority	11,015,107	9,725,605	9,746,280	9,087,035	10,333,053	9,304,666	(1,028,387)
Reimbursements	(456,944)	(561,178)	(429,147)	(494,474)	(795,707)	(378,343)	417,364
Total Appropriation	10,558,163	9,164,427	9,317,133	8,592,561	9,537,346	8,926,323	(611,023)
Operating Transfers Out	0	0	0	0	0	0	0
Total Requirements	10,558,163	9,164,427	9,317,133	8,592,561	9,537,346	8,926,323	(611,023)
<b>Sources</b>							
Taxes	0	0	0	0	0	0	0
Realignment	0	0	0	0	0	0	0
State, Fed or Gov't Aid	9,511,716	7,972,198	8,276,356	7,321,847	8,167,559	7,868,703	(298,856)
Fee/Rate	0	0	0	0	0	0	0
Other Revenue	4,899,237	144,606	136,427	10,862	0	0	0
Total Revenue	14,410,953	8,116,804	8,412,783	7,332,709	8,167,559	7,868,703	(298,856)
Operating Transfers In	0	1,057,620	1,057,620	1,207,627	1,369,787	1,057,620	(312,167)
Total Sources	14,410,953	9,174,424	9,470,403	8,540,336	9,537,346	8,926,323	(611,023)
Net County Cost	(3,852,790)	(9,997)	(153,270)	52,225	0	0	0
Budgeted Staffing					43	38	(5)

**MAJOR EXPENDITURES AND REVENUE IN 2014-15 ADOPTED BUDGET**

Staffing expenses of \$3.1 million fund 33 regular and 5 limited term positions. Operating expenses of \$6.2 million includes \$4.8 million in contracted services for the Senior Nutrition, Supportive Services, Family Caregiver, and Multipurpose Senior Services programs.

Total state, federal, or government aid revenue of \$7.9 million fund programs such as the Senior Nutrition Services (Title IIIC), Multipurpose Senior Services Program (MSSP), Health Insurance Counseling and Advocacy Program, Senior Supportive Services (Title IIIB), and Family Caregiver.

**BUDGET CHANGES AND OPERATIONAL IMPACT**

Requirements are decreasing by \$611,023 due to reductions in salaries and benefits (as a result of a departmental reorganization), services and supplies, contracted vendor payments, and reimbursements received from other departments.

Sources are decreasing by \$611,023 primarily as a result of the elimination of a one-time operating transfer from Human Services in 2013-14 and one-time revenue received late in 2013-14 from State and Federal sources.

**STAFFING CHANGES AND OPERATIONAL IMPACT**

Staffing expenses of \$3.1 million fund 38 budgeted positions of which 33 are regular positions and 5 are limited term positions. In 2014-15 budgeted positions will decrease from 43 to 38 due to the transfer of one Supervising Social Service Practitioner position to another program, and the deletion of 4 vacant positions (1 Staff Analyst II, 2 Social Service Aides and 1 Contract Ombudsman Lead Coordinator). A new Supervising Accounting Technician position was approved for reclassification in lieu of a vacant Staff Analyst II position. Operations will not be affected by the reductions as work duties have already be assumed by other Department staff.



**2014-15 POSITION SUMMARY**

Division	Regular	Limited Term	Total	Filled	Vacant	New	Total
Administration	8	0	8	8	0	0	8
Multipurpose Senior Services Program	9	0	9	9	0	0	9
Ombudsman	1	3	4	4	0	0	4
Senior Community Service Employment	0	2	2	2	0	0	2
Senior Information and Assistance	15	0	15	15	0	0	15
<b>Total</b>	<b>33</b>	<b>5</b>	<b>38</b>	<b>38</b>	<b>0</b>	<b>0</b>	<b>38</b>

Administration	Multipurpose Senior Services Program	Ombudsman
<u>Classification</u>	<u>Classification</u>	<u>Classification</u>
3 Accounting Technician	1 Fiscal Assistant	1 Cont Ombudsman Pgm Ofc Mgr
1 Administrative Supervisor II	2 Public Health Nurse	2 Cont Ombudsman Field Coordinator
3 Staff Analyst II	6 Social Worker II	1 DAAS Program Supervisor
1 Supervising Accounting Technician	9 Total	4 Total
8 Total		
<b>Senior Community Service Employment</b>	<b>Senior Information and Assistance</b>	
<u>Classification</u>	<u>Classification</u>	
2 Contract SCEP Prg Aide	2 DAAS Program Supervisor	
2 Total	6 Social Service Aide	
	7 Sr Information & Referral Rep	
	15 Total	



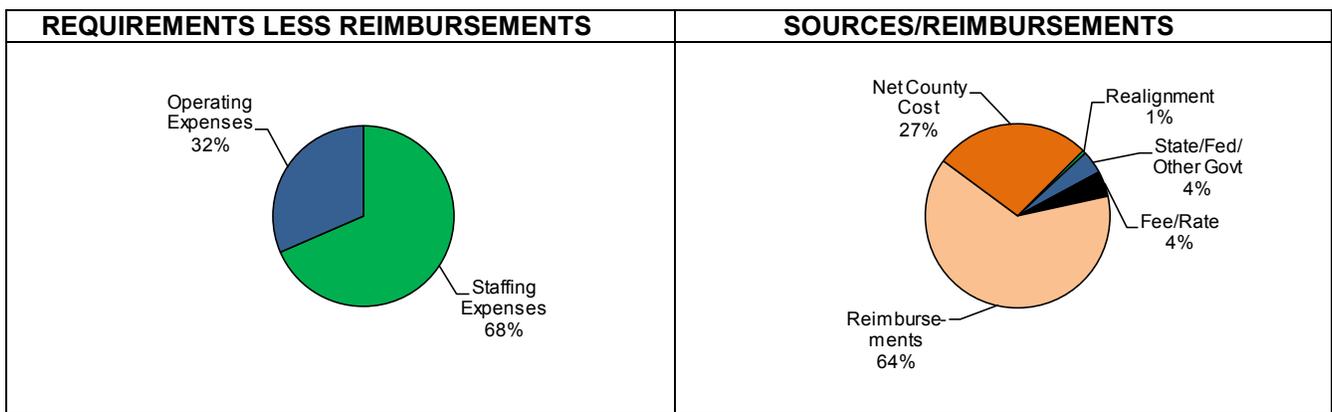
## Public Guardian - Conservator

### DESCRIPTION OF MAJOR SERVICES

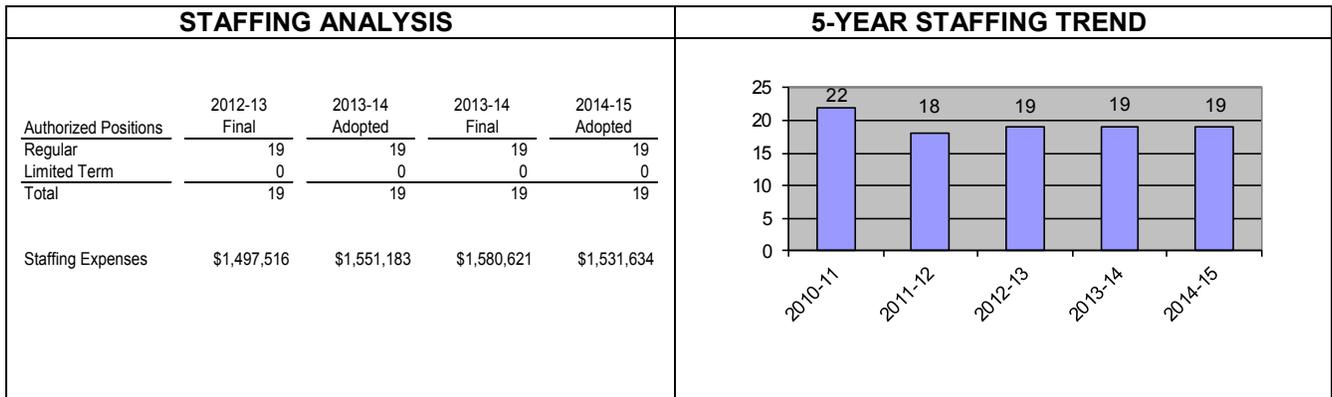
By court appointment, the Public Guardian-Conservator acts as conservator for any individuals found to be gravely disabled or to lack capacity to manage their finances and provide their own care. A conservator has the responsibility for the conservatee’s care, custody and control. The conservator determines where the conservatee lives and ensures his/her daily needs are met. Conservatees must be placed in the least restrictive placement, which may include, but is not limited to the following: medical, psychiatric, nursing, or other licensed facility or state hospital, County hospital, or United States government hospital.

Budget at a Glance	
Requirements Less Reimbursements*	\$2,236,756
Sources/Reimbursements	\$1,625,143
Net County Cost	\$611,613
Total Staff	19
Funded by Net County Cost	27%
*Includes Contingencies	

### 2014-15 ADOPTED BUDGET



### BUDGETED STAFFING



**ANALYSIS OF 2014-15 ADOPTED BUDGET**

GROUP: Human Services  
DEPARTMENT: DAAS - Public Guardian  
FUND: General

BUDGET UNIT: AAA PGD  
FUNCTION: Public Protection  
ACTIVITY: Other Protection

	2010-11 Actual	2011-12 Actual	2012-13 Actual	2013-14 Actual	2013-14 Final Budget	2014-15 Adopted Budget	Change From 2013-14 Final Budget
<b>Requirements</b>							
Staffing Expenses	1,382,729	1,291,130	1,410,648	1,520,273	1,580,621	1,531,634	(48,987)
Operating Expenses	532,682	751,034	640,965	567,954	727,108	705,122	(21,986)
Capital Expenditures	0	0	0	0	0	0	0
Contingencies	0	0	0	0	0	0	0
Total Exp Authority	1,915,411	2,042,164	2,051,613	2,088,227	2,307,729	2,236,756	(70,973)
Reimbursements	(1,374,673)	(1,397,484)	(1,358,597)	(1,229,252)	(1,374,808)	(1,422,192)	(47,384)
Total Appropriation	540,738	644,680	693,016	858,975	932,921	814,564	(118,357)
Operating Transfers Out	0	0	0	0	0	0	0
Total Requirements	540,738	644,680	693,016	858,975	932,921	814,564	(118,357)
<b>Sources</b>							
Taxes	0	0	0	0	0	0	0
Realignment	0	0	6,084	0	56,250	12,951	(43,299)
State, Fed or Gov't Aid	242,767	97,054	140,588	155,718	120,600	90,000	(30,600)
Fee/Rate	109,742	135,416	96,316	112,216	110,000	100,000	(10,000)
Other Revenue	643	514	179	(1,572)	0	0	0
Total Revenue	353,152	232,984	243,167	266,362	286,850	202,951	(83,899)
Operating Transfers In	0	0	0	0	0	0	0
Total Sources	353,152	232,984	243,167	266,362	286,850	202,951	(83,899)
Net County Cost	187,586	411,696	449,849	592,613	646,071	611,613	(34,458)
				Budgeted Staffing	19	19	0

**MAJOR EXPENDITURES AND REVENUE IN 2014-15 ADOPTED BUDGET**

Major expenditures and revenue represent the following:

- Staffing expenses of \$1.5 million will fund 19 budgeted positions.
- Reimbursements of \$1.4 million represent funding received primarily from the Department of Behavioral Health for conservatee case costs and from the Sheriff/Coroner/Public Administrator for reimbursement of warehouse operation costs.
- Realignment of \$12,951 represents AB109 Criminal Justice program revenue.
- State/federal/other government aid revenue of \$90,000 represents reimbursement for Medi-Cal Administrative Activities (MAA).
- Fee/Rate revenue of \$100,000 represents court-ordered fees paid to the Department from the estates of conservatees.

**BUDGET CHANGES AND OPERATIONAL IMPACT**

Requirements are decreasing by \$118,357 primarily due to an MOU salary adjustment and reduced transfers for shared administrative costs with DAAS and other Human Services divisions. Additionally, requirements for 2013-14 included costs for one-time incentives.

Sources are decreasing by \$83,899 as a result of reduced revenues received for the AB 109 Criminal Justice prisoner release program and fee revenue received from conservatees.

**STAFFING CHANGES AND OPERATIONAL IMPACT**

Staffing expenses of \$1.5 million fund 19 budgeted regular positions. There are no staffing changes.



**2014-15 POSITION SUMMARY**

<u>Division</u>	<u>Regular</u>	<u>Limited Term</u>	<u>Total</u>	<u>Filled</u>	<u>Vacant</u>	<u>New</u>	<u>Total</u>
Public Guardian - Conservator	19	0	19	19	0	0	19
Total	19	0	19	19	0	0	19

<b>Public Guardian - Conservator</b>	
<u>Classification</u>	
1	Chief Public Guardian
6	Deputy Public Guardian
2	Estate Property Specialist
1	Fiscal Assistant
1	Fiscal Specialist
3	Office Assistant III
1	Social Service Aide
1	Social Service Practitioner
1	Staff Analyst II
1	Supervising Office Assistant
1	Supv. Deputy Public Guardian I
19	Total

