

COUNCIL ACTION FORM

SUBJECT: MODIFICATION OF 2014/15 ASSET CONTRACT AND 2015/16 ALLOCATION TO HEARTLAND SENIOR SERVICES

BACKGROUND:

On December 24, 2014, ASSET received a letter from Heartland Senior Services making a request to modify the City and County funding for its Friendly Visitor and Service Coordination – Outreach (Outreach) services for the current fiscal year (2014/15) and for its FY 2015/16 allocation.

A total of \$1,619.69 remains in the FY 2014/15 account for Friendly Visitor. Heartland has requested to transfer this balance to Outreach. The City Council’s adopted budget for FY 2015/16 includes \$2,671 for Friendly Visitor, which Heartland proposes transferring in its entirety to Outreach. A contract has not yet been developed for FY 2015/16. No other Heartland services are affected by this request. The City’s approved service allocations and the revised requests are detailed below:

Service	2014/15		2015/16	
	Approved Amount	Revised Request	Approved Amount	Revised Request
Friendly Visitor	6,171	4,551.31	2,671	0
Service Coordination - Outreach	34,187	35,986.69	37,000	39,671
TOTAL	\$ 40,358	\$ 40,538	\$ 39,671	\$ 39,671

Heartland has proposed these changes because its Outreach service units were completely drawn down around January of this year. Simultaneously, Heartland has seen decreasing interest in the Friendly Visitor program. Heartland believes focusing on the Outreach program will provide the most benefit to the isolated senior population. Heartland has added a third outreach specialist, which allows outreach visits to be made more frequently, fulfilling a role that has traditionally been provided through Friendly Visitor.

ASSET staff has been told that it is Heartland’s intent to provide Friendly Visitor-type requests through Outreach as the need arises in the future. For budget requests in the future, Heartland will request more money through Outreach and none through Friendly Visitor.

The ASSET Administrative Team reviewed this request on February 4, and recommended that the remaining FY 2014/15 Friendly Visitor funds be reallocated to

Outreach. The Administrative Team further recommended that Friendly Visitor Services in the future be consolidated into Outreach, and funds for Friendly Visitor in FY 2015/16 be moved to Outreach. On February 12, ASSET reviewed the Administrative Team recommendation and concurred in recommending the changes to the funders.

Story County and United Way also purchase these services. Because United Way provides automatic 1/12 disbursements each month, no contract change with United Way has been requested. United Way has already approved the requested changes for FY 15/16. On March 3, the Story County Board of Supervisors approved Heartland's request to move the \$7,451 remaining in the County's allocation from Friendly Visitor to Outreach.

The City Council should note that in spring 2014, Heartland received approval from the City to move \$4,000 from Friendly Visitor to Outreach, citing low enrollment in Friendly Visitor.

If the request is approved, the approved unit cost of Service Coordination – Outreach services will remain unchanged. The number of units purchased will increase as the total amount for the services increases. Additionally, Heartland would be eligible to draw down for Outreach units already provided during this fiscal year, but which have not been paid because City funds have been exhausted.

ALTERNATIVES:

1. Approve modifications to Heartland Senior Services' ASSET allocations by:
 - a. Transferring the \$1,619.69 remaining in the FY 2014/15 Friendly Visitor allocation to Service Coordination – Outreach.
 - b. Directing staff to incorporate an allocation of \$39,671 for Service Coordination – Outreach and \$0 for Friendly Visitor in Heartland Senior Services' FY 2015/16 contract.
2. Direct staff to gather further information and report back to the City Council.
3. Do not approve the request

MANAGER'S RECOMMENDED ACTION:

Heartland Senior Services has seen a shift in the demand for its services, and this request is a response to that demand. Although Heartland has made this request before, the reorganization of the Friendly Visitor program into an as-needed service coordinated through Outreach will provide a more effective service in the future. The ASSET board has supported the request. Therefore, it is the recommendation of the City Manager that the City Council adopt Alternative No. 1a & b as described above.

HEARTLAND SENIOR SERVICES OF STORY COUNTY
205 South Walnut, Ames, A 50010
233-2906

DATE: December 24, 2014

TO: ASSET FUNDERS:
Deb Schildroth, Story County Board of Supervisors
Melissa Mundt, City of Ames
Jean Kresse, United Way of Story County

FROM: Elizabeth Beck
Executive Director
ebeck@hsservicesia.com

RE: Revised ASSET FY15 line allocations for Friendly Visitor and Outreach Services from Heartland Senior Services of Story County

In May 2014, Heartland Senior Services submitted a request regarding the ASSET 13-14 budget to move some of the city and county funding allocated to the Friendly Visitor Service to the Outreach Service. The reason for the request was the low numbers of participants requesting Friendly Visitor Service which was resulting in unused ASSET dollars. However, the Service Coordination units provided by the Outreach staff side of the program had exceeded the funding allocation for that program.

Heartland Senior Services is requesting ASSET permit the funding allocated to Friendly Visitor for this current FY15 year and the FY16 year be moved to the Service Coordination-Outreach line. This shift in funding more closely reflects the service units being provided to the senior population in Story County.

The ASSET statistical sheets submitted in December of this year indicate that the Service Coordination-Outreach units have almost depleted the city and county allocations in the first five months. We project that this also will be the case in FY16. At the same time we see the increase in Outreach units of service, we are seeing a decrease in the number of seniors who wish to have a Friendly Visitor. (When our Outreach Specialists meet with an isolated senior for the purpose of providing resource referral, the Specialist does offer the opportunity to participate in the Friendly Visitor Program.)

At the programmatic level, we have reorganized the Service Coordination Program this year to bring in a third part-time Outreach Specialist to handle the requests for resource and referral assistance in a more timely manner.

Should ASSET need more information or documentation, we would be happy to provide that. Thank you for considering this request.