

Welcome To the 19th Annual Senior Services' Levy Fund Board Conference



MoALSO

Introductions & Announcements

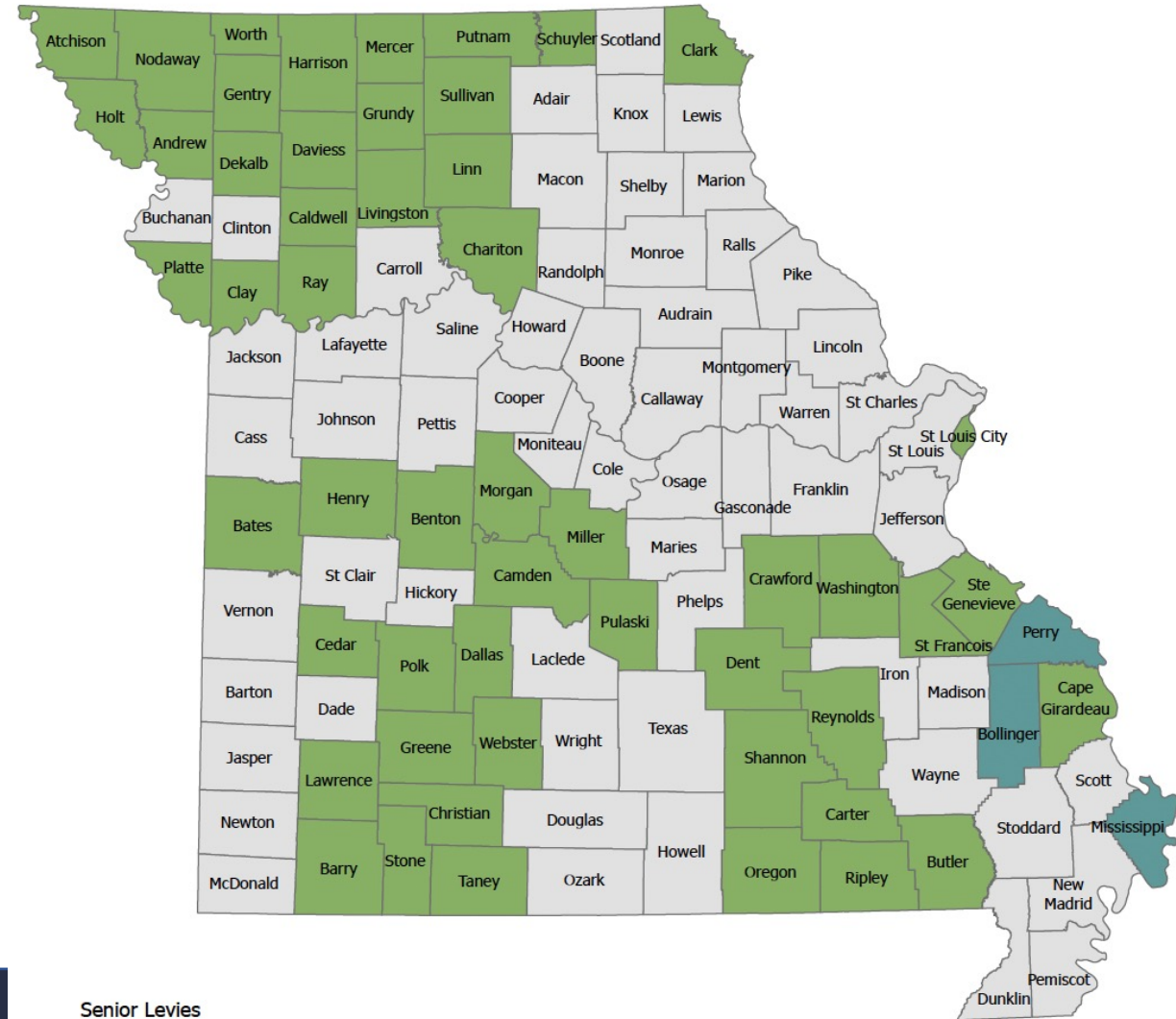


MoALSO Opportunity Grant Objectives

How It Started

- 1. The first objective is to share best practices for HCBS services for older adults and their caregivers.
- 2. The second objective is for members to become more informed and active advocates.
- 3. The third objective of the association will be to focus on expanding membership by identifying urban and rural counties across the state ready to pass a senior levy fund and ultimately increase more services to older adults in Missouri counties that currently do not have a senior levy fund.

Missouri Counties with Senior Levies



Senior Levies

- Counties with Senior Levy Funds
- Counties with Senior Levy Funds funded by Sales Tax
- No Senior Levy



MFH Grant | **Grant Deliverables –**

- ✓ Association website to share information about existing funds and the services they support and other resources
- ✓ Hosting monthly educational sessions on best practices and governance issues
- ✓ Completion of a Senior Levy Fund Campaign toolkit
- ✓ County Senior Readiness Assessments completed with advocates in counties



MFH Grant | **Grant Deliverables**

In-Progress

- Increase the number of association members from 15 to 20 (currently at 13 members)
- Assess the commitment of 15 communities to initiate efforts to place a senior levy fund on the local ballot
- Provide training to 10 counties who are committed to implementing a senior fund efforts
- Develop a plan and budget to amend the Missouri State Statute to increase the senior levy tax



Every Voice Matters | **Future of MoALSO Advocacy**

- Missouri Council on Aging



Plan for Increasing Senior Levy Funds

Goal: To amend the Missouri State Statute to increase the senior levy tax from five to 10 cents per \$100 of assessed valuation

Primary Audience/Decision Maker: State legislators



Plan for Increasing Senior Levy Funds

Evaluation of the Political Landscape

Factors to Consider:

- Philosophy on Taxation of Property
 - “Immoral Tax”
- August 2024 Primaries
 - Influence of elections on Capitol action
- Other legislation impacting the aging population & senior levys
 - Circuit Breaker
 - Rewrites to SB 190
 - Income tax reform
 - Property tax proposal



Plan for Increasing Senior Levy Funds

Evaluation of the Political Landscape

Factors to Consider:

- State Budget
 - Largest budget in state's history and infusion of dollars for aging population
- House Dynamics & Senate Dynamics
 - Many members running for higher office
 - Conservative caucus influence
- Use insight gained from MCOA interviews



Plan for Increasing Senior Levy Funds

Policy Development

Possible paths for funding:

- Amending state statute from 5 cents to 10 cents
- Allow the option of a "Senior Services Sales Tax"
- Pool of state funds with an appropriations match
- TIFF Exemption



Plan for Increasing Senior Levy Funds Needed Advocacy Components

Strategies for Advocacy:

- Build a Coalition
- Identify Barriers & Opportunities
- Identify Legislative Champions
- Strategic Communication
- Identify & Train Advocates
- Educate Lawmakers
- Lobbying



Plan for Increasing Senior Levy Funds

Advocacy vs. Lobbying

Advocacy allows you to advance your coalition's mission. Examples can include talking to a reporter about your organization's impact in the community, encouraging local civic groups to send volunteers or money to support an effort (e.g., provide funds to support meals for older adults.) It can also mean telling and educating policy makers about your work and sharing your expertise in helpful ways.

Lobbying is communicating with decision makers (elected officials, their staff and voters on ballot measures) about existing or potential legislation and urging a vote for or against.



A WEE LITTLE
THOUGHT
EXPERIMENT

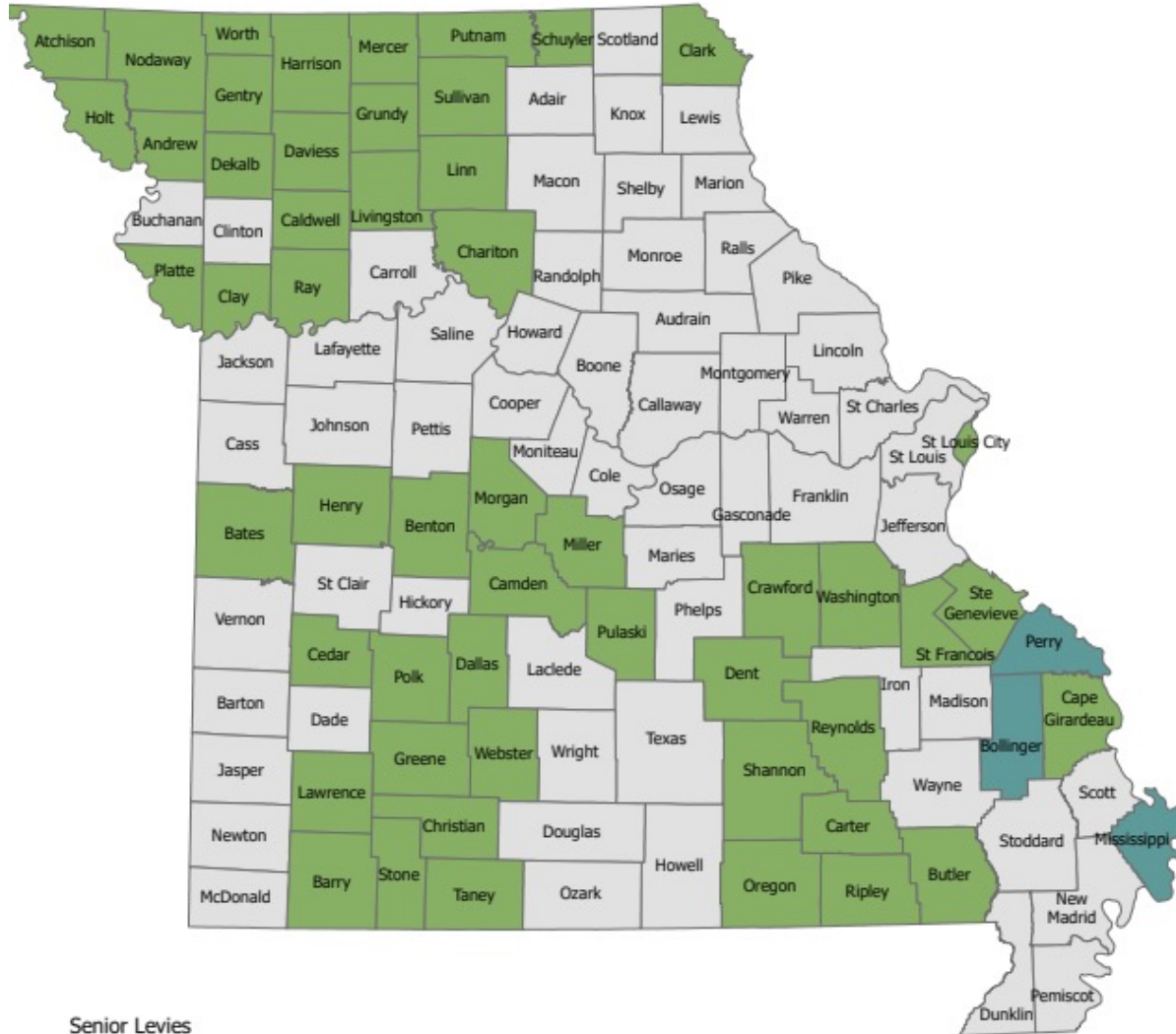


Missouri Senior Service Levy Funds: Current Levy Rate & Revenue Collected by County, 2021

Statewide	\$17.5M		Daviess	\$0.0500	\$75K	Polk	\$0.0461	\$183K
Andrew	\$0.0273	\$84K	DeKalb	\$0.0294	\$63K	Pulaski	\$0.0441	\$243K
Atchison	\$0.0492	\$90K	Dent	\$0.0480	\$86K	Putnam	\$0.0452	\$47K
Barry	\$0.0483	\$277K	Gentry	\$0.0500	\$54K	Ray	\$0.0461	\$180K
Bates	\$0.0500	\$124K	Greene	\$0.0486	\$2.7M	Reynolds	\$0.0300	\$53K
Benton	\$0.0472	\$143K	Grundy	\$0.0500	\$68K	Ripley	\$0.0465	\$52K
Butler	\$0.0476	\$315K	Harrison	\$0.0496	\$66K	Schuyler	\$0.0490	\$61K
Caldwell	\$0.0500	\$91K	Henry	\$0.0423	\$183K	Shannon	\$0.0492	\$44K
Camden	\$0.0460	\$828K	Holt	\$0.0463	\$72K	St. Francois	\$0.0473	\$428K
Cape Girardeau	\$0.0478	\$714K	Lawrence	\$0.0473	\$258K	St. Louis City	\$0.0488	\$2.3M
Carter	\$0.0497	\$42K	Linn	\$0.0486	\$87K	Ste. Genevieve	\$0.0295	\$263K
Cedar	\$0.0497	\$98K	Livingston	\$0.0498	\$102K	Stone	\$0.0482	\$359K
Chariton	\$0.0500	\$129K	Mercer	\$0.0455	\$38K	Sullivan	\$0.0500	\$54K
Christian	\$0.0469	\$715K	Miller	\$0.0479	\$228K	Taney	\$0.0475	\$574K
Clark	\$0.0500	\$64K	Morgan	\$0.0417	\$239K	Washington	\$0.0472	\$137K
Clay	\$0.0427	\$2.3M	Nodaway	\$0.0496	\$198K	Webster	\$0.0455	\$231K
Crawford	\$0.0464	\$169K	Oregon	\$0.0465	\$52K	Worth	\$0.0500	\$17K
Dallas	\$0.0500	\$99K	Platte	\$0.0457	\$1.5M			

Source: Office of the Missouri State Auditor

Missouri Counties with Senior Levies



If the remaining 60 counties voted on a levy board, how much money would go to support older adults 60+ in Missouri?

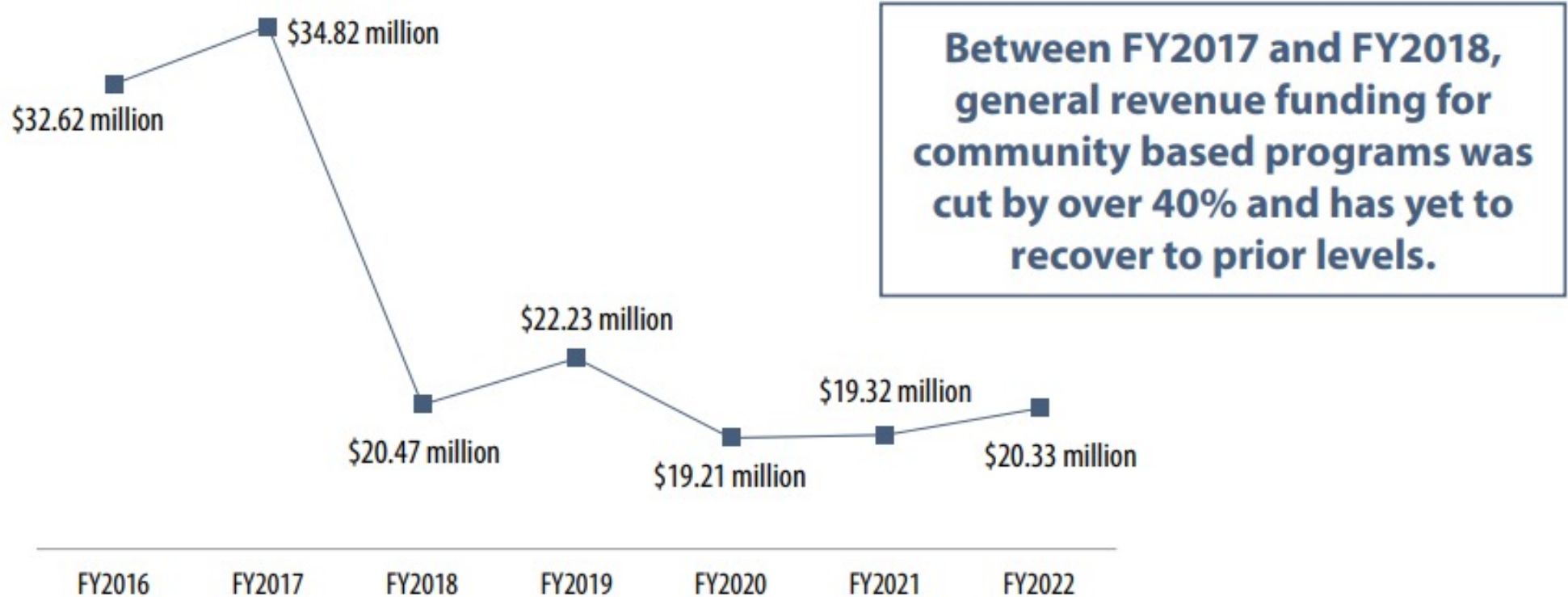
Senior Levies

- Counties with Senior Levy Funds
- Counties with Senior Levy Funds funded by Sales Tax
- No Senior Levy

\$44,216,132.00*

General Revenue Funding for Community-Based Supports & Services

FY 2016 - FY 2022



Source: Department Budget Requests: FY 2017 - FY 2023

A WEE LITTLE
THOUGHT
EXPERIMENT





Who advocates for all older adults in Missouri?



MCOA

MISSOURI COUNCIL ^{ON} AGING

Think

- Think Big about aging in Missouri

Establish

- Establish a robust, cross-sector, multidisciplinary coalition

Promote

- Promote the full story of aging

Amplify

- Amplify the collective needs of older adults in Missouri

Missouri Counties with Senior Levies

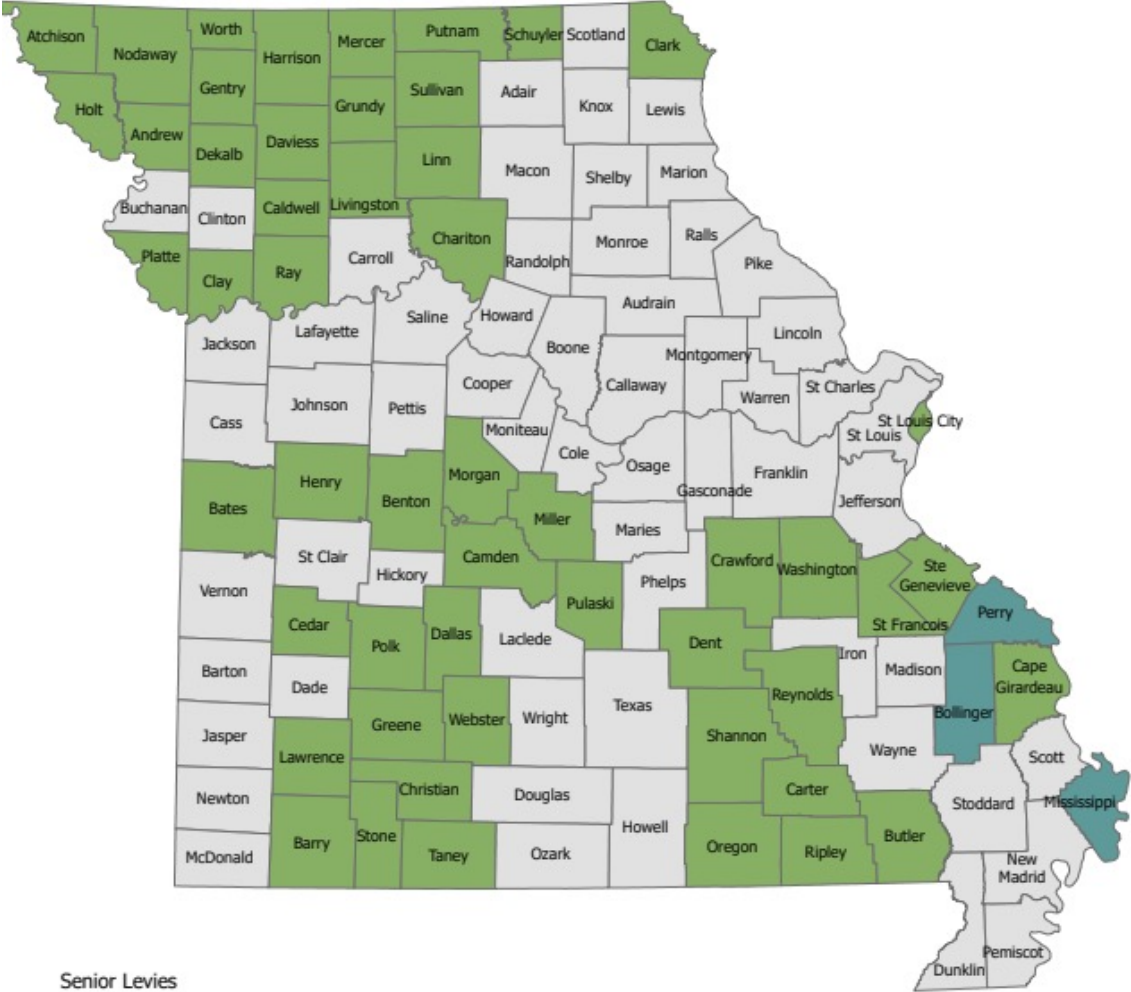
Summer 2023

Legislative and Community-Based Outreach
MCOA/MOALSO

40 Legislators (and counting)

SE MO (Bootheel) – 17 counties
 St. Louis City
 St. Louis County
 St. Charles County
 NE MO - 8 Counties
 Central MO – 6 counties

Total = 34 Counties



Senior Levies
■ Counties with Senior Levy Funds
■ Counties with Senior Levy Funds funded by Sales Tax
■ No Senior Levy

What We Believe

Aging means us not
them (We)

Aging intersects
with a variety of
factors

Older adults
contribute at the
local, state, and
national levels

What We Do

1

We advocate for local, state, and national policies and programs that uplift lives and reinforce the dignity inherent in the aging process.

2

We educate decision-makers to influence change by shedding light on the issues and challenges older adults face while proposing innovative policy changes.

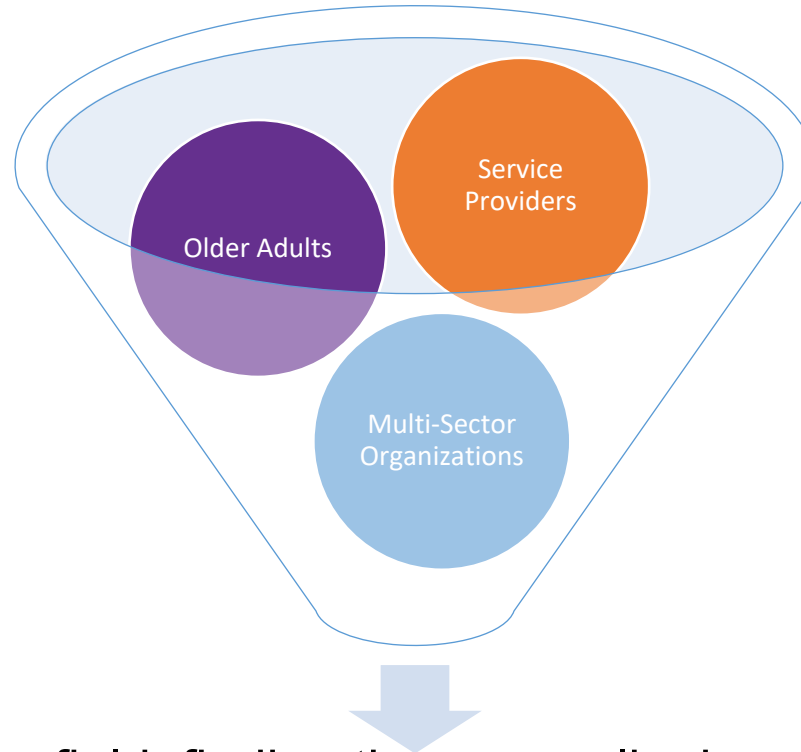
3

We engage a cross-sector network to amplify the needs of older adults in Missouri.

4

We lead initiatives that shape the narrative about older adults in Missouri

Audience Segments



Monitoring the field, finding the gaps, aligning on issues, and translating the needs of older adults and related audiences to policymakers and leaders at the state, local, and municipal level.

How We Do It



INNOVATION



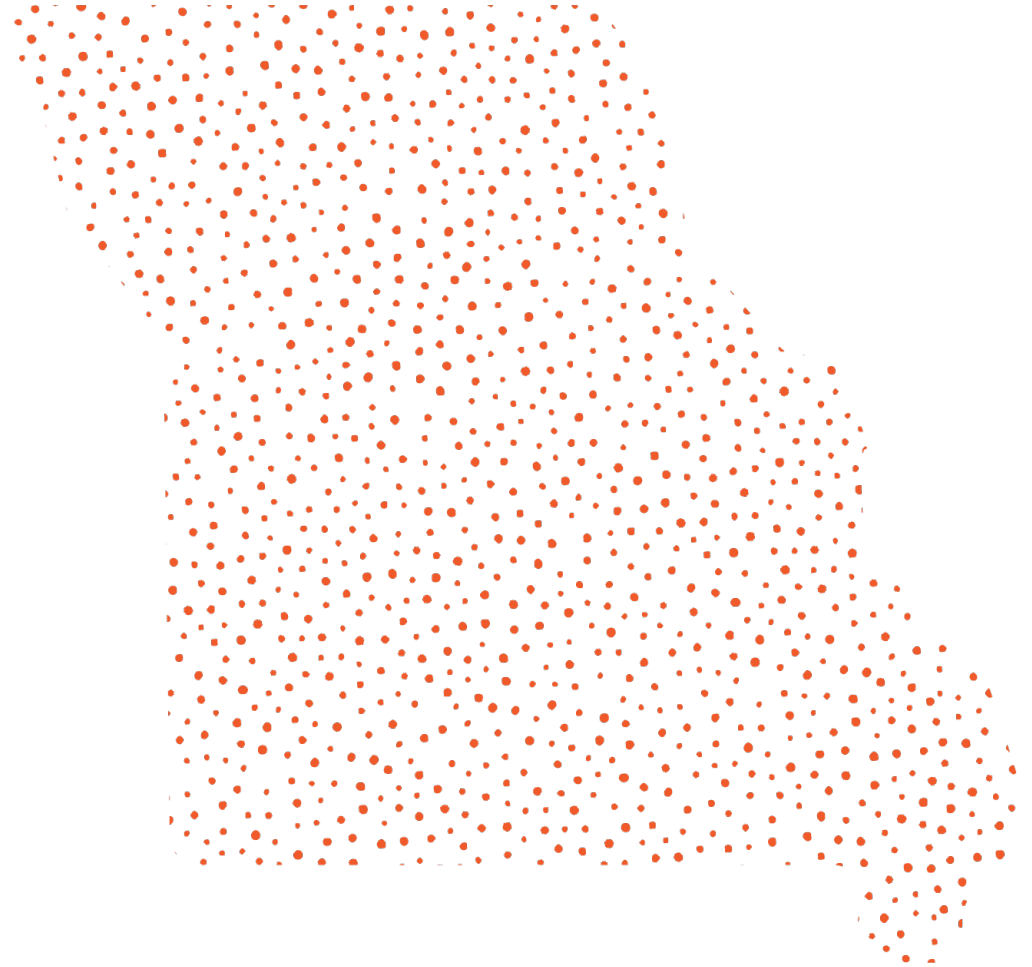
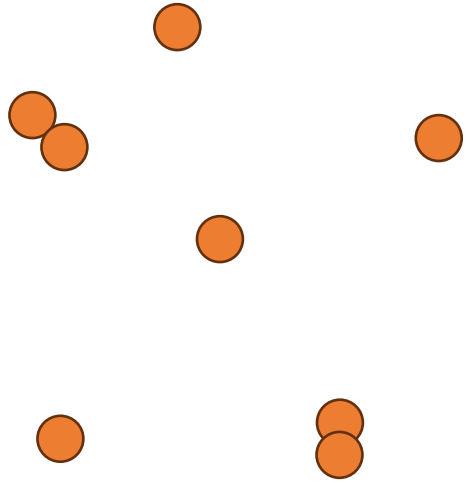
COLLABORATION



COMMUNICATION



ADVOCACY



MCOA
MISSOURI COUNCIL ON AGING

Connect with Senior Center Directors

- We are celebrating Senior Centers
- Introduce MCOA to a Senior Center doing great work in your community

Nicole Brueggeman, MSW, LSCW, MA
Nicole@missouricouncilonaging.org
636-237-3338



How Levy Boards support Missouri's Senior Centers



Ideas for Senior Centers

- ▶ Partner with local grocery stores to receive leftover bread products
- ▶ Start a travel program and charge a nominal fee per person
- ▶ Weekly senior country dance with live music
- ▶ Holistic Hour, participants are guided through reflexology, education, and guided meditations
- ▶ Gardening Group, facilitate a group that discusses and engages garden education, coaching, and visioning



Ideas for Senior Centers

- ▶ Offer free tax preparation every year
- ▶ A visiting nurse once a month that checks blood pressure and sugar glucose
- ▶ Crochet class lead by senior volunteers
- ▶ Posting regularly on Facebook and on surrounding areas group pages to increase attendance
- ▶ Canning class offered through local food pantry



Ideas for Senior Centers

- ▶ Offer salad/soup bar once a week to dine-in and carry-out meals for clients. “We obtained a grant to purchase the equipment needed and hope to attract new clients.”
- ▶ Become a member of Meals on Wheels America. This is a powerful resource for all senior programs. “We have received several grants and great ideas to continue forward.”





Partnerships



- ▶ Partner with Catholic Charities to assist with applications and referrals for a mobile food pantry
- ▶ Gallatin Bright Futures and C3 Partnerships are programs that support our local school. ” We partner with them to support grandparents raising their grandchildren”
- ▶ Partner with emergency management to prepare for/respond to local disasters and severe weather events
- ▶ Synergy Services - Clinical Department for mental health resources



Partnerships

- ▶ Parkville Main Street Association – “New leadership makes our senior center feel included and opens up opportunities for partnering.”
- ▶ KC Digital Drive - Digital Inclusion and ACP (Affordable Connectivity Program) [Signups. Affordable Connectivity Program | Federal Communications Commission \(fcc.gov\)](#)
- ▶ Partnership with school district and working towards doing more multi-generational programs, in addition supporting initiatives such as the annual resource fair for low-income students in our community.

“Mixing these two demographics is great for our seniors and our youth.”



Funding sources

Regional Planning Commissions

Carter County had success with Ozark Foothills Regional Planning Commission for grant writing/ ARPA funds for new roof, floor, ceiling and a modern kitchen. [In addition, \\$25,000 was awarded for the senior center. Regional Council- RPCs - MO Association of Councils of Government \(macog.org\)](#)

Mid-America Regional Council is home to the KC region's Area Agency on Aging.

(see regional county contacts in your packet)

New Resources and Funding Sources

- ▶ Clay County Senior Services received \$80,000 in ARPA funding for transportation and nutrition expenses related to COVID-19. Some counties are reporting that there are still ARPA funds leftover.
- ▶ Senior Growth & Development Funds distributed by AAA for nutrition program
- ▶ Community investment: City/County funding, foundations, donors, planned giving.
- ▶ Funding technology access and education through our AAA (MARC) and KC Digital Drive.
- ▶ Clay County Senior Fund supported a grant writer for one of our largest partners and considering expanding to other partners that struggle with writing grants.



Challenges:

- ▶ AAA funded senior centers are receiving more funding than pre-COVID. Will it continue after CARES Act and ARPA monies are depleted?
- ▶ Serving more meals and the costs have increased dramatically.
- ▶ Finding someone to come in once a month and do some type of technology classes with our seniors.



Challenges

- ▶ Managing growth—Christian County
- ▶ [Christian County nonprofit reports a huge increase in senior citizens coming in for meals \(ky3.com\)](#)

Attracting new participants





Advocacy



- ▶ “Missouri legislators—especially rural legislators are very supportive of senior centers and are aware of how important they are to their communities and how underfunded they are--they need to hear from us” Nicole Bruggeman, Missouri Council on Aging on her road trip across Missouri
- ▶ Make sure Legislators know how much funding senior levy boards contribute
- ▶ [HGTV lists Liberty among top 20 'best small towns to retire' | | mycouriertribune.com](#)



Discussion & Questions?

Other ideas, funding, resources, challenges?





Governance & Policy

Board Member Attendance

- Board Absence: Policy **Removal of Members**
- Members may be removed from the Board upon a majority vote of the remainder of the Board of Directors on any of the following grounds:
 - A. Failure to attend five consecutive meetings, without good cause;
 - B. Conduct prejudicial to the good order and efficient operation of the Board or prejudicial to the furtherance of its appointed responsibilities and duties;
 - C. Neglect of duty.
- The Board defines neglect of duty as repeated failure to attend meetings without good cause and failure to notify the Executive Director prior to the meeting as outlined in Section 3.F. "Quorum". The Chair may recommend to the Board of Directors that such request for removal of a member be forwarded to the Commission for appointment of a successor member.

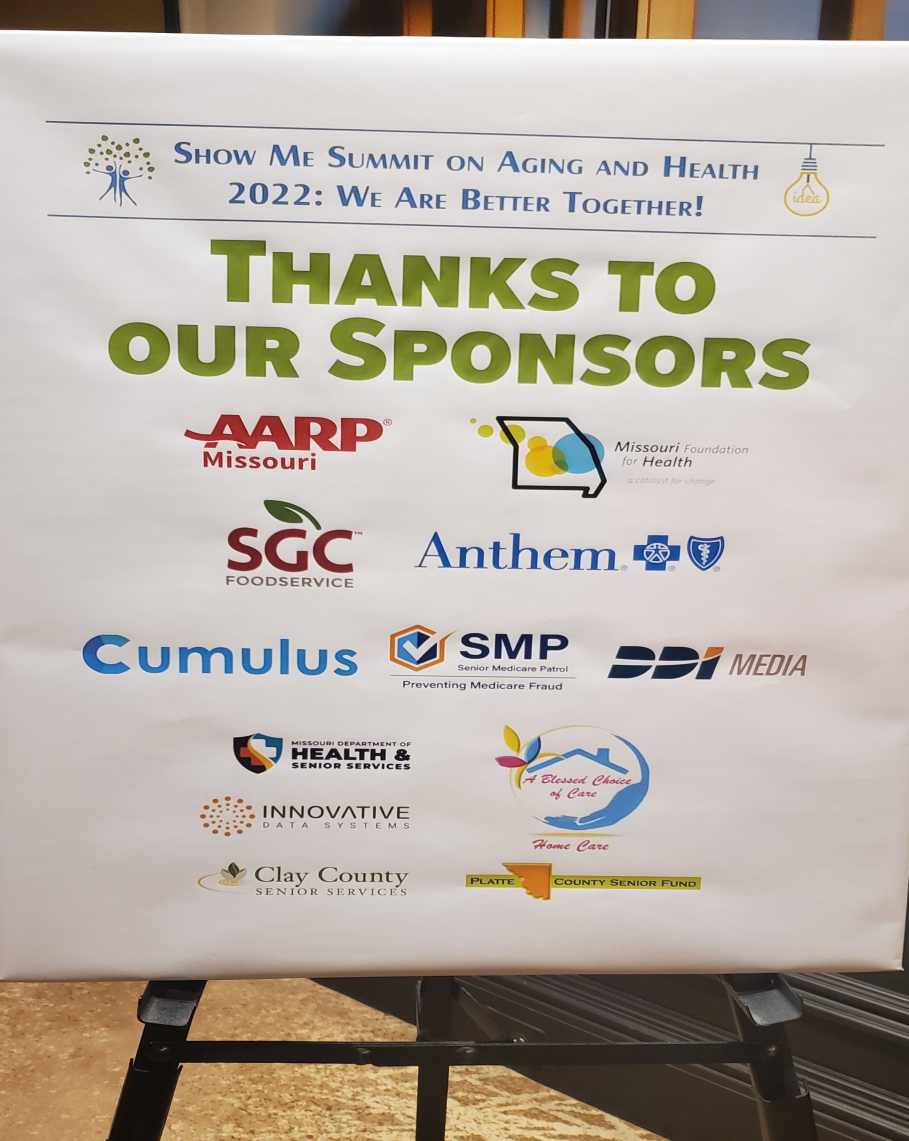
Governance & Policy



Can levy boards use funds for professional educational development, advocacy, and sponsorships? YES!

- Conferences-local and national for board members and grantees
- Small investment to increase professionalism in the field
- Join advocacy and senior focused organizations such as:
 - National Council on Aging
 - Missouri Council on Aging
- Other Civic Engagement sponsorships—Alzheimer’s walk, grantee fundraisers

Examples:



Governance & Policy

Sunshine Law



- **Adoption of Rules**

The Board of Directors will adopt rules and regulations regarding the application of the Sunshine Law, Sections 610.010-610.030, RSMo, to the Board and this organization including the appointment of a custodian of record and procedures for the copy and delivery of records when requested.

- (see Sunshine Law resolution in handout)

Levy Boards Governance & Policy

Public Relations



- The importance of communicating senior levy boards accomplishments/impact each year:
 - Grants awarded
 - New programs or partnerships
 - Announcing new board members/retiring board members
 - Remind the public how important the senior levy is with proposed tax cuts and underfunded services
- How do you share your good news?
 - Annual Report
 - Articles in local newspaper (see Grundy sample)
 - Present info at the senior center
 - Social media and websites



MISSOURI DEPARTMENT OF
**HEALTH &
SENIOR SERVICES**

Division of Senior & Disability Services

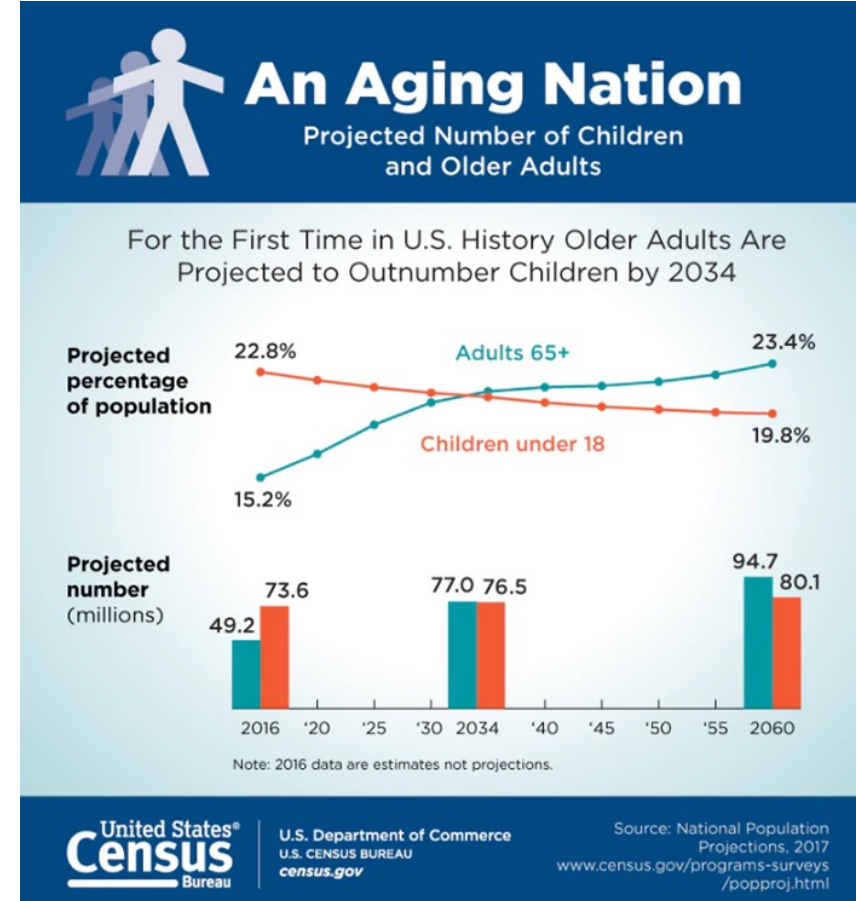


AGING WITH DIGNITY
Missouri's Master Plan on Aging

Mindy Ulstad, Chief
Bureau of Senior Programs

Background

- Missouri seniors age 65+ make up 22.88% of the population
 - By 2034, Missouri seniors will make up more than 25% of Missouri's population (for the first time there will be more older adults than individuals younger than 18 years of age).
- This gap will continue to widen as the population continues to age with Missouri seniors predicted to greatly outnumber children by 2060.



Missouri's Population is Aging

What is a Master Plan on Aging?

- A Master Plan on Aging is a living document that:
 - Provides a clear framework to plan for ten years or more;
 - Enables governors to communicate a clear vision and priorities for their state;
 - Guides state and local policies of public and private programs toward aging with dignity;
 - Reflects extensive input from the community, including people of all ages and abilities; and
 - Allows the state to allocate funding or resources to implement initiatives from the Master Plan vs. reacting to individual stakeholder needs

Differences between the State Plan on Aging and a Master Plan on Aging

Metric	State Plan on Aging	Master Plan on Aging
Requirement	ACL Requires for Funding	Not Required
Timeframe	4-Years (Next Plan due June 2023)	10-Years
Roadmap For	Aging Network (SUA, AAAs and their Contractors)	All State Departments, State and Local Governments to work toward aging with dignity
Focus	<p>Older American Act Funded Programs/Services</p> <ul style="list-style-type: none"> • Supportive Services (Access, In-home, legal) • Nutrition (Congregate & Home-delivered meals) • Disease Prevention Health Promotion • Family Caregiver Services 	<p>All Relevant Social Determinants of Health</p> <ul style="list-style-type: none"> • Transportation • Housing (Universal Design/Home Modification) • Mental Health and Substance Abuse • Aging with Developmental Disabilities • Assistive Technology • Healthcare Access • Employment
Coordination/ Input	Aging Network Providers (AAAs and their contractors)	All Providers of Programs and Services (all State Departments, State and Local Governments, All Contractors of these entities)

Executive Order 23-01

On January 19, 2023, Governor Parson signed EO 23-01 ordering the commencement of the Missourians Aging with Dignity Initiative. The order further required the following:

1. Executive agencies shall make their best efforts to ensure that all Missourians have access to services and supports they are eligible for in order to age safely and independently.
2. Each state agency shall use best efforts to ensure programming includes older Missourians and adults with disabilities when possible with the ultimate goal of ensuring older Missourians and adults with disabilities have a safe and healthy environment and avoid unnecessary institutionalization.
3. DHSS shall, with the assistance of the Advisory Council described below, develop a Master Plan on Aging that addresses the needs and health outcomes for older adults and individuals with disabilities.
4. The Department of Health and Senior Services shall finalize the Master Plan on Aging by December 31, 2025.
5. The Director of the DHSS shall designate stakeholders to be a part of the Advisory Council for the Master Plan on Aging. These stakeholders shall be diverse in nature, and represent a cross-section of interests including groups concerned with aging in place, supporting those with disabilities, local governments, healthcare providers, and health research institutions and associations. Stakeholders may help lead subgroups representing the needs identified in the statewide needs assessment.
6. The director or commissioner of each state agency shall designate, within 30 days of the request of the Director of the Department of Health and Senior Services, an employee or employees who will participate on the Advisory Council and provide data, information, and support for developing and implementing the Master Plan on Aging.

Executive Order 23-01

Through the executive order, DHSS was tasked with the following activities:

1. Reviewing and assessing the current state of aging services in Missouri;
2. Coordinating and completing at least ten listening sessions with key stakeholders in the Area Agency on Aging regions with at least two listening sessions available statewide;
3. Completing a statewide senior citizen and adults with disabilities needs assessment;
4. Establishing priorities for each state agency and communicating those priorities to key stakeholders; and
5. Developing the Master Plan on Aging.

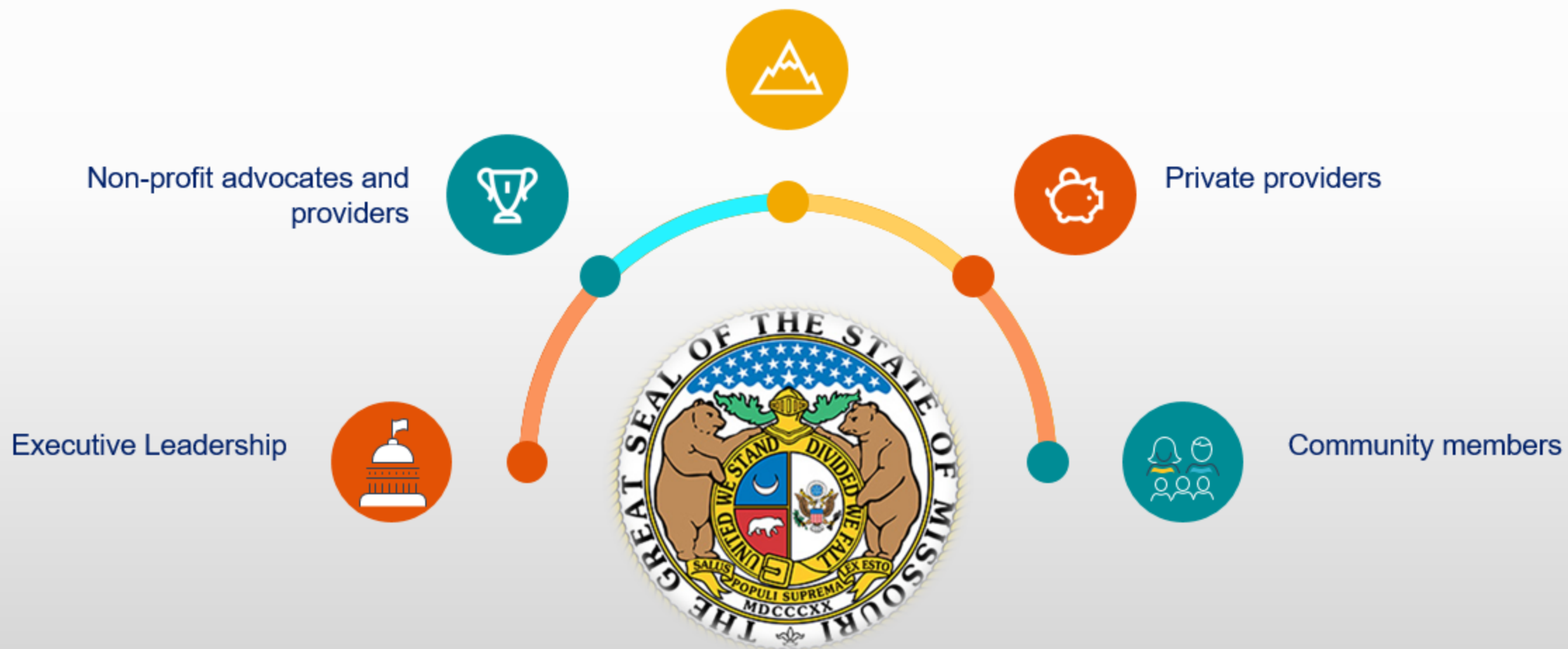
Components of a Master Plan on Aging



Ecosystem

It's going to take all of us

Business and community leaders



Building on recent related work

MISSOURI DEPARTMENT OF HEALTH & SENIOR SERVICES

2024-2027 MISSOURI STATE PLAN ON AGING

Division of Senior and Disability Services

health.mo.gov

HEALTH in RURAL MISSOURI

Biennial Report 2020-2021

MISSOURI ASSISTIVE TECHNOLOGY

2022 Annual Report



2022 MISSOURI ALZHEIMER'S STATE PLAN TASK FORCE REPORT AND RECOMMENDATIONS

Missouri Senior Community Service Employment Program (SCSEP) State Plan 2020-2023

MISSOURI STATEWIDE TRANSIT NEEDS ASSESSMENT

MISSOURI PUBLIC TRANSIT ASSOCIATION

May 2022
Final Report
Prepared by: Lochmueller Group
Prepared for: Missouri Public Transit Association, Missouri Department of Transportation

<https://mpublictransit.org/>

Missouri Oral Health Plan 2020-2025

A Five-Year Plan for the Missouri Department of Health and Senior Services.

Created in Partnership with the Oral Health State Plan Workgroup and Missouri Coalition for Oral Health.



Missouri's Master Plan on Aging Advisory Council

Cabinet Members

Ken Zellers, Office of Administration
Chris Chinn, Agriculture
Sara Parker Pauley, Conservation
Anne Precythe, Corrections
Maggie Kost, Economic Development
Margie Vandeven, Elementary & Secondary Education
Paula F. Nickelson, Health & Senior Services
Leroy Wade, Higher Education & Workforce Development
Chlora Lindley-Myers, Commerce & Insurance
Anna Hui, Labor & Industrial Relations
Val Huhn, Mental Health
Dru Buntin, Natural Resources
Sandy Karsten, Public Safety
Wayne Wallingford, Revenue
Robert J. Knodell, Social Services
Patrick McKenna, Transportation

Administration Members

Lieutenant Governor Mike Kehoe

Legislative Members

Senator Mike Moon
Representative Yolanda Fountain Henderson

Missouri's Master Plan on Aging Advisory Council (continued)

Subject Matter Experts with Statewide Associations

Lana Johnson, Aging Matters and President of ma4

Deb Hobson, Centers for Independent Living

Tiffany Bayer, DHSS Centers for Local Public Health Services

Tina Uridge, Senior Tax Levy Boards

Cindy Shultz, Missouri Association of Councils of Governments

Tim Brinker, County Commissioners Association of Missouri

Richard Sheets, Missouri Municipal League

Sheli Reynolds, UMKC Institute for Human Development

Jon Doolittle, Missouri Hospital Association

Jay Hardenbrook, Missouri AARP

Beth Brown, MERS Goodwill & Senior Community Services Employment Program

Sarah Lovegreen, Alzheimer's Association Greater Missouri Chapter

Nancy Pennington, Missouri Association of County Developmental Disability Services

Paul Kirchoff, Missouri Veterans Commission

LaTasha Barnes, Legal Services of Eastern Missouri

Angel Surdin, DHSS Office of Minority Health

Jamie Opsal, Missouri Council on Aging

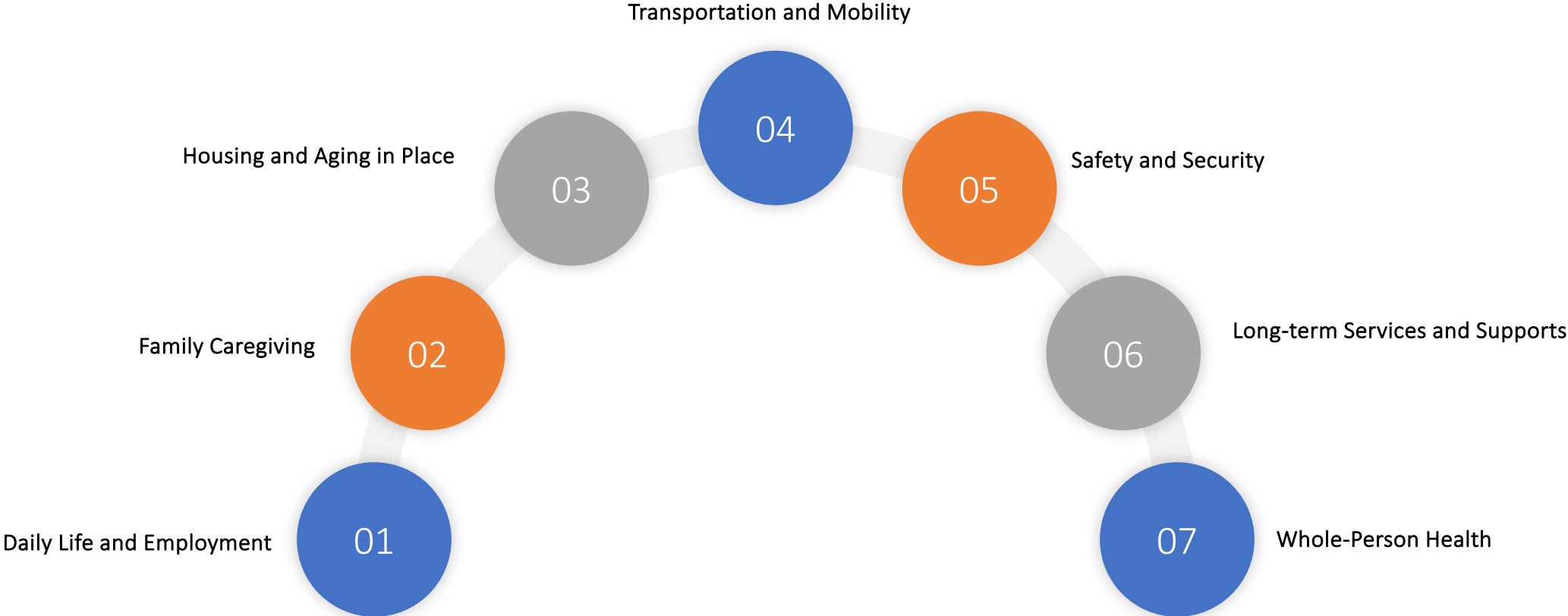
Jennifer Carter Dochler, Missouri Foundation for Health

Angela Williams, Health Forward Foundation

Jenni Miller, Missouri Housing Development Commission

Craig Escude, M.D., IntellectAbility

Subcommittees



Workgroups

Deeper Dive into the Work

Daily Life & Employment

- Daily Life
- Employment

Family Caregiving

Have not decided on workgroups yet.

Housing & Aging In-Place

- Affordable Housing
- Universal Design
- Home Modification/Repair/Maintenance
- Rental Issues
- Laws and City Codes

Transportation & Mobility

- Rural
- Small Urban
- Urban

Safety & Security*

- Financial Security
- Guardianships and Conservatorships
- Mandated Reporting
- Cross-Departmental Functioning and Internal Processes

Long-Term Services & Supports

Have not decided on workgroups yet.

Whole-Person Health

- Physical Health
- Healthy Eating
- Behavioral Health
- Social Connection
- Cognitive Health
- Health Equity

*tentative, may change

Overarching Work on the Master Plan on Aging

Advisory Council

Transportation

Housing & Aging in Place

Whole Person Health

Daily Life & Employment

Safety & Security

Family Caregivers

Long-Term Supports and Services (LTSS)

Equity

Access

Choice

Early Wins from the Master Plan on Aging

Changes are already happening!

- The work of the MPA has brought together entities that have never worked together before
 - this has already started new collaborations outside of the MPA work
- One group mentioned that the process for filing for the Shared Care Tax Credit could be daunting for an older adult, an adult with disabilities, or caregivers who are already overburdened
 - DHSS was able to review the process, determine partners to work with, and trained them to be able to assist with completing the process to apply for the Shared Care Tax Credit
- Another group mentioned that there was not enough information for caregivers on support services for them
 - We worked with members of the committees to develop a caregiver resource list
- Older workers are an important part of the workforce but often face age discrimination due to old ageist beliefs
 - We are restarting the Outstanding Older Worker Week recognition to highlight the qualities of older workers and their value in the workplace

Master Plan on Aging Website

Background Information, Meeting Agendas, and Past Meeting Notes

A new master plan on aging website is available. You can find the website at this link:

<https://health.mo.gov/seniors/master-plan-aging.php>

- This website contains a short description/background information
- Upcoming meeting agendas
- Past meeting minutes
- Additional Resources and Information

Our Team



Melanie Highland
DSDS Director



Laura Newland
MPA Coordinator
Alvarez and Marsal



Mindy Ulstad
Chief, Bureau of Senior Programs



MISSOURI DEPARTMENT OF
**HEALTH &
SENIOR SERVICES**

QUESTIONS?



Mindy.Ulstad@health.mo.gov



573-526-4542



Health.Mo.Gov/Seniors/