V(A). Planned Program (Summary)

Program # 4

1. Name of the Planned Program

Family Issues, Resources and Environments

V(B). Program Knowledge Area(s)

1. Program Knowledge Areas and Percentage

<table>
<thead>
<tr>
<th>KA Code</th>
<th>Knowledge Area</th>
<th>% 1862 Extension</th>
<th>% 1890 Extension</th>
<th>% 1862 Research</th>
<th>% 1890 Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>801</td>
<td>Individual and Family Resource Management</td>
<td>45%</td>
<td></td>
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<tr>
<td>802</td>
<td>Human Development and Family Well-Being</td>
<td>45%</td>
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<tr>
<td>804</td>
<td>Human Environmental Issues Concerning Apparel, Textiles, and Residential and Commercial Structures</td>
<td>10%</td>
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<tr>
<td>Total</td>
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</table>

V(C). Planned Program (Inputs)

1. Actual amount of professional FTE/SYs expended this Program

<table>
<thead>
<tr>
<th>Year: 2009</th>
<th>Extension</th>
<th>Research</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1862</td>
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</tr>
<tr>
<td>Plan</td>
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</tr>
<tr>
<td>Actual</td>
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<td>0.0</td>
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</tbody>
</table>

2. Actual dollars expended in this Program (includes Carryover Funds from previous years)

<table>
<thead>
<tr>
<th></th>
<th>Extension</th>
<th></th>
<th>Research</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1862</td>
<td>1890</td>
<td>1862</td>
<td>1890</td>
</tr>
<tr>
<td>Smith-Lever 3b &amp; 3c</td>
<td>13466</td>
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<tr>
<td>1862 Matching</td>
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<td>0</td>
</tr>
<tr>
<td>1862 All Other</td>
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<tr>
<td>1890 Extension</td>
<td>1890</td>
<td>1890</td>
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<td>1890 Matching</td>
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<td>0</td>
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<td>0</td>
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<tr>
<td>1890 All Other</td>
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</tbody>
</table>

V(D). Planned Program (Activity)

1. Brief description of the Activity

- Conduct Workshops in all areas.
- Develop support groups where and when necessary.
- Partner with Agencies, Associations, Organizations, Real Estate Personnel, County Health Officials, Montana Building Industry Association.
- Develop Fact Sheets on AIPRA for Tribal Members.
- Develop curriculum on AIPRA for Tribal Members, estate planning in general; indoor air quality and record keeping systems; Well maintenance folders.
- Conduct Seminars on Estate Planning Healthy Indoor Environments.
- Revise MontGuides (fact sheets) to reflect the changes in state and federal laws related to estate planning.
- Develop publications on Asthma Awareness and lead-based paint.
2. Brief description of the target audience

Caregivers of Alzheimer Patients
Home Health Care Providers
Certified Nursing Assistants
Tribal Members who own undivided interests in trust lands on a reservation
Farmers/Ranchers
Montana Financial Educational Coalition Partners
4-H Leaders
State Agency Employees
Home Builders, housing authorities, real estate professionals
Remodeling Contractors
Weatherization Contractors
Homeowners
Senior Citizens

V(E). Planned Program (Outputs)

1. Standard output measures

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>Direct Contacts Adults</th>
<th>Indirect Contacts Adults</th>
<th>Direct Contacts Youth</th>
<th>Indirect Contacts Youth</th>
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</thead>
<tbody>
<tr>
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<td>3500</td>
<td>30</td>
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<tr>
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<td>3284</td>
<td>20</td>
<td>50</td>
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</tr>
</tbody>
</table>

2. Number of Patent Applications Submitted (Standard Research Output)

Patent Applications Submitted

Year: 2009
Plan: 0
Actual: 0

Patents listed

3. Publications (Standard General Output Measure)

Number of Peer Reviewed Publications

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>Extension</th>
<th>Research</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan</td>
<td>2</td>
<td>0</td>
<td>2</td>
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</tr>
<tr>
<td>Actual</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

V(F). State Defined Outputs

Output Target

Output #1

Output Measure

- Alzheimer's Mini Series: Conduct two mini series in the state. Based on past experience, 60 people could participate in each of the sessions.

<table>
<thead>
<tr>
<th>Year</th>
<th>Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>75</td>
<td>132</td>
</tr>
</tbody>
</table>
Output #2

Output Measure

- Estate Planning, Passing of Reservation Lands: An estimated 1000 people will attend an in-depth seminar on estate planning and promotion and will begin to make plans. Distribute the revised MontGuide on state and federal law changes to 1400 participants who have purchased Estate Planning: The Basics packet. Reprint the curriculum "Track'n Your Saving Goals Register" MontGuide and develop materials with ideas on how to save. Prepare materials for presentation and seminars on AIPRA on reservations that request it; an estimated 200. Prepare a series of fact sheets that explain AIPRA and distribute them to tribal members; approximately 300.

<table>
<thead>
<tr>
<th>Year</th>
<th>Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>800</td>
<td>1280</td>
</tr>
</tbody>
</table>

Output #3

Output Measure

- Grandparents Raising Grandchildren: Produce and distribute a bimonthly newsletter to all Extension Offices, grandparents, and others on the mailing list; currently 150 names. Provide support and assistance to start educational/support groups in local communities for grandparents who are parenting children. Currently, there are 15 in the state.

<table>
<thead>
<tr>
<th>Year</th>
<th>Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>400</td>
<td>250</td>
</tr>
</tbody>
</table>

Output #4

Output Measure

- Housing and Environmental Quality: Number of publications/fact sheets distributed. Number of participants attending home environmental workshops/programs. Number of people testing their wells, doing radon tests.

<table>
<thead>
<tr>
<th>Year</th>
<th>Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>1000</td>
<td>1342</td>
</tr>
</tbody>
</table>
### V(G). State Defined Outcomes

#### V. State Defined Outcomes Table of Content

<table>
<thead>
<tr>
<th>O. No.</th>
<th>OUTCOME NAME</th>
</tr>
</thead>
</table>
| 1      | Alzheimer's Mini Series:  
Seventy-five participants in the Alzheimer's Mini Series will learn about financial planning issues, nutrition, home modifications, and family interactions related to caring for an Alzheimer's patient.  
Seventy percent (70%) of the participants will cope with caring for an Alzheimer's patient more effectively.  
Participants will feel more comfortable in their care-giving role and will have a greater understanding of how they can assist a loved one afflicted with Alzheimer's. |
| 2      | Estate Planning, Passing of Tribal Lands, Savings:  
The percent of people who reviewed their property titles and made changes in them, who had an attorney write a will, who reviewed their will and had an attorney update it, who began a gifting program, who made a list of tangible personal properties, who reviewed beneficiaries on their life insurance policies, who discussed estate planning with family members, who learned that Montana law would not distribute their property as they desire, who learned that their estate is not large enough that federal estate taxes would apply.  
Number of participants who attended the educational sessions to learn about AIPRA.  
Number of feature articles on AIPRA printed in the local newspapers, newsletters and aired over the radio and requests for additional information as a result.  
Number of tribal members who shared the fact sheets with relatives and talked about estate planning with friends and relatives.  
Number of parents who open a savings account for their children, discuss saving with family members, and complete a savings goal worksheet.  
The percent of people who actually did the list of items under short term (the things they learned about).  
The percent of people who used POD and TOD designations.  
Number of people who request a copy of an Informational Title Report from the Bureau of Indian Affairs.  
The number of people who start saving with a financial institution, open an IRA, 401 k or 403 b plan, and whose children are beginning to save.  
Farms and ranches will be able to be transferred intact without being sold to provide equally to all heirs of to pay death costs.  
More Montana families will be financially secure at retirement |
| 3      | Grandparents Raising Grandchildren:  
Number of grandparents who gain information to assist them in their parenting role, become aware of services available to support them, and learn about methamphetamine and how it affects the user.  
Number of grandparents who begin to use current parenting strategies, prepare nutritious meals for themselves and their grandchildren, seek information to assist with their financial and legal issues related to parenting their grandchildren.  
Number of grandparents and their families will experience reduced stress and grandchildren will have a safe and nurturing environment in which to grow. |
| 4      | Home Energy Costs:  
Number of participants who learn common methods to save home energy by applying measures to new or existing homes.  
Number of participants who are using high performance, resource efficient building materials and construction techniques in remodeling and new construction.  
Number of participants who increase their purchase of EnergyStar products and appliances resulting in an energy saving of at least 30% annually per appliance.  
Number of participants who experience an energy savings due to weatherizing and remodeling of existing homes resulting in an annual 13-65% energy savings per household.  
Number of participants who increase utilization of the Montana Energy Tax Credit program. |
| 5      | Housing and Environmental Quality:  
Number of participants who learn about environmental health concerns common to new and existing homes - molds, water quality, lead-based paint, radon, etc.  
Number of people requesting information related to home/environmental concerns.  
Homes in Montana will routinely be tested/assessed and mitigated for environmental health issues (molds, radon, asbestos, drinking water, carbon monoxide) |
Outcome #1

1. Outcome Measures

Alzheimer's Mini Series: Seventy-five participants in the Alzheimer's Mini Series will learn about financial planning issues, nutrition, home modifications, and family interactions related to caring for an Alzheimer's patient. Seventy percent (70%) of the participants will cope with caring for an Alzheimer's patient more effectively. Participants will feel more comfortable in their care-giving role and will have a greater understanding of how they can assist a loved one afflicted with Alzheimer's.

2. Associated Institution Types

- 1862 Extension

3a. Outcome Type:

Change in Condition Outcome Measure

3b. Quantitative Outcome

<table>
<thead>
<tr>
<th>Year</th>
<th>Quantitative Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>75</td>
<td>132</td>
</tr>
</tbody>
</table>

3c. Qualitative Outcome or Impact Statement

Issue (Who cares and Why)
Montana has 50 counties that are considered rural enough that residents have greater obstacles in accessing care for families affected by Alzheimer’s. (Frontier Counties) These obstacles include: distance, terrain, climate, lack of providers, and fewer available specialty services.

What has been done
In 2009, a webinar was conducted with interested people from Kansas and Nebraska on Alzheimer’s and how to use the toolkit. The audience was largely Extension Agents. In Montana, the program is winding down. The problem is still there, but is being addressed through different programs, specifically a Program called Powerful Tools for Caregivers.

Results
Four toolkits were purchased by Kansas Extension faculty. They are using the kits for professional development as well as to offer the series to the public. In 2009, 33 new class leaders were trained giving them the skills to offer the six-week Powerful Tool for Caregivers course. Four County Extension Agents received the Master Trainer designation and can conduct "class leader" trainings. Participant evaluations indicate they made statistically significant gains in knowledge and planned behavior after taking the six week course; they can take care of themselves while providing care to another and have better overall health themselves which in turn makes them better prepared to care-give their loved one.

4. Associated Knowledge Areas

<table>
<thead>
<tr>
<th>KA Code</th>
<th>Knowledge Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>801</td>
<td>Individual and Family Resource Management</td>
</tr>
<tr>
<td>802</td>
<td>Human Development and Family Well-Being</td>
</tr>
</tbody>
</table>
Outcome #2

1. Outcome Measures

Estate Planning, Passing of Tribal Lands, Savings: The percent of people who reviewed their property titles and made changes in them, who had an attorney write a will, who reviewed their will and had an attorney update it, who began a gifting program, who made a list of tangible personal property, who reviewed beneficiaries on their life insurance policies, who discussed estate planning with family members, who learned that Montana law would not distribute their property as they desire, who learned that their estate is not large enough that federal estate taxes would apply. Number of participants who attended the educational sessions to learn about AIPRA. Number of feature articles on AIPRA printed in the local newspapers, newsletters and aired over the radio and requests for additional information as a result. Number of tribal members who shared the fact sheets with relatives and talked about estate planning with friends and relatives. Number of parents who open a savings account for their children, discuss saving with family members, and complete a savings goal worksheet. The percent of people who actually did the list of items under short term (the things they learned about). The percent of people who used POD and TOD designations. Number of people who request a copy of an Informational Title Report from the Bureau of Indian Affairs. The number of people who drew a family generational tree to determine to whom their property will pass upon their death; who wrote a will in their own handwriting, retitled property into joint tenancy with right of survivorship, who decided to establish a life estate, who wrote a will, who talked with an attorney about writing a will, who shared the fact sheets with an immediate family member. The number of people who start saving with a financial institution, open an IRA, 401 k or 403 b plan, and whose children are beginning to save. Farms and ranches will be able to be transferred intact without being sold to provide equally to all heirs of to pay death costs. More Montana families will be financially secure at retirement.

2. Associated Institution Types

- 1862 Extension

3a. Outcome Type:

Change in Knowledge Outcome Measure

3b. Quantitative Outcome

<table>
<thead>
<tr>
<th>Year</th>
<th>Quantitative Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>800</td>
<td>1280</td>
</tr>
</tbody>
</table>

3c. Qualitative Outcome or Impact Statement

Issue (Who cares and Why)
Montanans are interested in planning for the distribution of their wealth following their death. Statistics reveal that 70% die without a will. The state legislature continues to change the intestate succession (dying without a will law) and contract laws that impact beneficiaries of real and personal property. Farmers/ranchers/owners of closely held businesses are interested in inter-generational transfers. This is especially true on Indian Reservations where landowners need to plan for passing their agricultural land to avoid further fractionation under the American Indian Probate Reform Act.

What has been done
"Think You know Who Gets Your Property When You Die .. Think Again" is a program presented in 49 locations across the state. Topics also included plans and tools to address succession planning, estate planning and interpersonal family and business relationships. An interactive website and CD illustrates how property passes under Montana law when a person dies without a written will. Educational materials on the American Indian Probate Reform Act are still available.

Results
Evaluations done with participants following estate planning programs, website and CD opportunities reveal 95% were able to find their specific situation on the Internet/CD and 90% recommend the CD/website to other Montanans. After learning about Montana laws: 38% discussed estate planning with their family; 37% drafted a will for the first time and 22% revised their current will. When asked who users intended to share this information with: 58% reported their spouse/partner; 49% their children; 27% other family members; and 29% friends. There
were 2,152 hits on the website in 2009. During 2009, there were 1,130 visits to the website containing 14 fact sheets on the American Indian Probate Reform Act. The fact sheets were also utilized by the Justice Works AmeriCorps Legal Fellow in a notebook for a Continuing Legal Education course for 20 Pro Bono attorneys. The 14 fact sheets, 13 media articles and eight PowerPoint presentations are being used on the Blackfeet, Fort Belknap, and Fort Peck reservations.

4. Associated Knowledge Areas

<table>
<thead>
<tr>
<th>KA Code</th>
<th>Knowledge Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>801</td>
<td>Individual and Family Resource Management</td>
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</table>

Outcome #3

1. Outcome Measures

Grandparents Raising Grandchildren: Number of grandparents who gain information to assist them in their parenting role, become aware of services available to support them, and learn about methamphetamine and how it affects the user. Number of grandparents who begin to use current parenting strategies, prepare nutritious meals for themselves and their grandchildren, seek information to assist with their financial and legal issues related to parenting their grandchildren. Number of grandparents and their families will experience reduced stress and grandchildren will have a safe and nurturing environment in which to grow.

2. Associated Institution Types

- 1862 Extension

3a. Outcome Type:

Change in Knowledge Outcome Measure

3b. Quantitative Outcome

<table>
<thead>
<tr>
<th>Year</th>
<th>Quantitative Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>400</td>
<td>250</td>
</tr>
</tbody>
</table>

3c. Qualitative Outcome or Impact Statement

**Issue (Who cares and Why)**

Montana ranks 9th in the nation for the increase in Grandparents Raising Grandchildren. In almost all cases, grandparents are called upon to parent their grandchildren due to a crisis or failure in the nuclear family. Caregiving/parenting takes an emotional toll on grandparents. There can be guilt and/or shame over the failure of their children to carry out their parenting responsibilities and grandparents become frustrated with today's child rearing philosophies, which differ from their own experiences.

**What has been done**

A newsletter is sent to Extension Offices, grandparents and others who request it 3 times a year. A website for grandparents is maintained with up-to-date information and a list serve is available for grandparents and others to share information. Additionally, seminars, trainings, informal discussion or support groups are conducted.

**Results**

Support group facilitators distribute a retrospective pre-post test evaluation form to participants. Results indicate that grandparents make statistically significant improvements in * finding resources, * understanding parenting today, * realizing they cannot control the choices their adult children make, * how to advocate for their grandchild, and * reaching out to others when they are stressed. Grandparents are more comfortable in seeking information and assistance with their financial and legal issues related to parenting their grandchildren - 42% sought financial assistance, legal and mental health assistance from community partners.

4. Associated Knowledge Areas

<table>
<thead>
<tr>
<th>KA Code</th>
<th>Knowledge Area</th>
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<tbody>
<tr>
<td>801</td>
<td>Individual and Family Resource Management</td>
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Outcome #4

1. Outcome Measures

Home Energy Costs: Number of participants who learn common methods to save home energy by applying measures to new or existing homes. Number of participants who are using high performance, resource efficient building materials and construction techniques in remodeling and new construction. Number of participants who increase their purchase of EnergyStar products and appliances resulting in an energy saving of at least 30% annually per appliance. Number of participants who experience an energy savings due to weatherizing and remodeling of existing homes resulting in an annual 13-65% energy savings per household. Number of participants who increase utilization of the Montana Energy Tax Credit program.

Not Reporting on this Outcome Measure

Outcome #5

2. Associated Institution Types

   ● 1862 Extension

3a. Outcome Type:

   Change in Knowledge Outcome Measure

3b. Quantitative Outcome

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<thead>
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<th>Year</th>
<th>Quantitative Target</th>
<th>Actual</th>
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<tbody>
<tr>
<td>2009</td>
<td>1000</td>
<td>1342</td>
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</table>

3c. Qualitative Outcome or Impact Statement

   Issue (Who cares and Why)
   Across the state, consumer, real estate professionals, county health officers and others are reporting alarming incidences and health effects related to home environmental issues such as: high radon levels, asthma, molds, asbestos in vermiculate insulation, drinking water contamination, improperly installed and maintained septic systems, carbon monoxide from faulty heating systems and lead-based paint.

   What has been done
   There have been training sessions with housing authorities, tribes, real estate agents, home inspectors, waste water treatment operators, health departments, and Extension agents.

   Results
   As a result of Extension programming, 172 homes were tested and corrected for radon, 38 homes tested and corrected for carbon monoxide, 65 homes tested and corrected for excessive moisture and mold. Additionally, 110 families were assisted with asthma trigger control, 85 households learned how to safely manage household chemicals, 465 septic system publications were distributed to households and 65 grease prevention folders were provided to Montana food services. Feedback shows correction strategies were taken for radon, carbon monoxide and mold. In the other areas covered by programming, participants indicate they have gained knowledge that will assist them in addressing future issues.

4. Associated Knowledge Areas
KA Code  Knowledge Area
804  Human Environmental Issues Concerning Apparel, Textiles, and Residential and Commercial Structures

V(H). Planned Program (External Factors)

External factors which affected outcomes
- Economy
- Public Policy changes
- Government Regulations

Brief Explanation
(No Data Entered)

V(I). Planned Program (Evaluation Studies and Data Collection)

1. Evaluation Studies Planned
   - After Only (post program)
   - Before-After (before and after program)
   - During (during program)

Evaluation Results
(No Data Entered)

Key Items of Evaluation
(No Data Entered)