



AGENDA - ADRC of Southwest WI-Iowa County Board
Tuesday, October 25, 2022 at 10:00 a.m.

Conference Call: 1-312-626-6799

Zoom Meeting ID: 847 6317 8672

Passcode: 798394

<https://us02web.zoom.us/j/84763178672?pwd=NE1lcGlJOFQzeHBJallqTUVIUGFCZz09>

**Health & Human Services Center, Community Room,
 303 W Chapel St., Dodgeville, WI 53533**

**Iowa
 County
 Wisconsin**

1	Call to order.
2	Roll Call.
3	Approve the agenda for this October 25, 2022 meeting.
4	Approve the minutes of the August 23, 2022 meeting.
5	Report from committee members and an opportunity for members of the audience to address the committee. No action will be taken.
6	Overview Presentation of ADRC and Aging Program by ADRC Manager.
7	Action Item: Approve Revised Bus and Taxi Guidelines
8	Action Item: Approve Revised Driver Escort Procedures
9	Action Item: Approve 2023 85.21 Grant Application
10	Action Item: Approve 2023 GWAAR Budget Application
11	Review ADRC Monthly Financial Summaries. No action will be taken.
12	Review ADRC Third Quarter Financial Summary. No action will be taken.
13	Department Reports: a) SUN: b) ADRC: (EBS, DBS, ADRCS, and Transportation)
14	ADRC Manager: a) ADRC Managers Report b) Advocacy Updates
15	Set next meeting date: Tuesday, December 6, 2022 at Health & Human Services Center, 303 W. Chapel Street, Dodgeville, WI 53533. 10:00 a.m. Zoom will still be an option.
16	Adjournment.
	Posting verified by: ADRC Date: 10.11.2022 Initials: DR/KS

TUESDAY, AUGUST 23, 2022

State of
Wisconsin
County of
Iowa

**UNAPPROVED MINUTES OF THE ADRC OF SOUTHWEST WISCONSIN
IOWA COUNTY BOARD MEETING HELD
TUESDAY, AUGUST 23, 2022 at 10:00 a.m.
HEALTH & HUMAN SERVICES CENTER
303 W. CHAPEL ST., DODGEVILLE, WI 53533**

2022-06

Item		Index
1)	Chairman Richter called the meeting to order at 10:00 a.m.	Call to Order
2)	Roll Call – Members Present in Community Room: Doug Richter, Brad Stevens, Alice Fisher, W. William Ladwig, Elsie Jayne Murphy, J. Patrick Reilly, Marilyn Rolfsmeyer, George Swamp Members Present Remotely: Nancy Clements, Brenda Hlavac, Susan Schroeder Members Excused: Michael Britt, Kathy Elliott, Dianne Evans, Lynn Munz Others Present in Community Room: Nikki Mumm, Valerie Hiltbrand, Steve Deal, Cecile McManus Others Present Remotely: Patrick Klein	Roll Call
3)	Approval of the August 23, 2022 Agenda. Motion by Ladwig and seconded by Stevens to accept the agenda. Motion carried.	Agenda Approval
4)	Approval of the July 26, 2022 meeting minutes. Motion by Ladwig and seconded by Rolfsmeyer to accept the meeting minutes. Motion carried.	Meeting Minutes Approval
5)	No comments.	Members of audience address Committee
6)	Valerie Hiltbrand shared part one of a two-part presentation and will share the second part at the next meeting. A copy of the slides as well as a larger copy of the Organizational Chart will be sent to Board Members.	Overview Presentation of ADRC and Aging Program by ADRC Manager
7)	Report provided. Mumm presented. There was a typo in the numbers, and a revised report will be sent to Board Members.	Monthly Financial Summary
8)	Review Department Reports: SUN (Seniors United for Nutrition): McManus presented. They had live music at the Arena meal site on August 10 sponsored by Folklore Village. It was successful, and they plan to do it again at the Dodgeville meal site in October. She has been working on filling volunteer driver slots in Dodgeville and is currently full. GWAAR is going to contract with the counties directly instead of with SUN. The counties have indicated that they will contract with SUN and are now working on a contract. SUN has asked for a large increase in levy from both counties. They have had an increase in meals, which has caused an increase in expenses. They have had extra funding due to the pandemic but will not after this year. If they do not receive the extra funds, they will need to prioritize who they serve. They are working on validating eligibility as they have been able to be flexible during the pandemic. They are having a hard time getting participants to return to the congregate sites after the closures due to the pandemic. EBS and DBS (Elder & Disability Benefit Specialist): Report provided. Hiltbrand presented. We do not have any DBS case counts as the Lafayette County DBS has	Review Department Reports

	been assisting with our cases while our DBS is on maternity leave, and is able to count those cases as her own. ADRC Specialists (formerly I&A): Report provided. Hiltbrand presented. There was a typo in the numbers, and a revised report will be sent to Board Members. ADRC Transportation: Report provided. Mumm presented. The bus will be taking residents to the Iowa County Fair on September 2 and has received free tickets for riders from Uplands Wind. Please get the word out to residents to sign up. We normally have a four passenger minimum on the bus but have decreased that to two riders through October. Beginning in November, we will need to go back to the four passenger minimum.	
9)	ADRC Manager's Report: Report provided. Hiltbrand presented. She followed up regarding a previous question on whether the by-laws need to be updated to reflect that a County Board Supervisor needs to be the Chair of the Board. The County Administrator does not believe we need to update the by-laws as this is only a preference of the current County Board Chair and not a requirement. The ADRC Specialists may have some "unwinding" coming up when the pandemic ends due to clients coming off of long-term care programs and Medicaid. Staff will need to help figure out next steps for the clients as some may have had in-home supports that they are no longer eligible for. The Federal government will give the State 60-days' notice to end the Public Health Emergency and, once that notice is received, we can drill down on the processes. The Stepping On prevention program being held in Cobb in September is full. Advocacy Updates: ADRC staff will be at the Fair Street apartments in Mineral Point on Wednesday, August 24, to hold office hours for residents who would like to talk to anyone regarding resources. Emergency Management has also offered to do a presentation on safety for residents. The Dementia Stabilization Unit is working on opening. They are having a meeting later this week to discuss. This is a short-term opportunity for those with dementia to stabilize and return to their least restrictive setting. There will be supports provided from the Dementia Stabilization staff to help caregivers in the home handle things going forward, medication adjustments, and provide additional support to nursing homes and assisted living homes if that is where a resident's least restrictive setting is. They have a contracted psychologist available, if residents need it. The Older Adult Advisory Board is full and the first meeting will be September 16, 2022. The ADRC is participating in the Community Health Needs Assessment with Upland Hills Health and the Iowa County Health Department. Surveys are being analyzed and the group will soon be working on a DRAFT document.	ADRC Manager
10)	Tuesday, September 27, 2022 approved for the next ADRC Board meeting. 10:00 a.m., HHS Center, Community Room, Dodgeville. Zoom is still an option.	Next Meeting Date
11)	Motion by Ladwig and seconded by Murphy to Adjourn. Motion carried. Meeting adjourned at 11:20 a.m.	Adjourn

ADRC and Aging Programs (continued)

ADRC of Southwest Wisconsin, Iowa County
303 W. Chapel St.
Dodgeville, WI 53533
(608)930-9835
www.adrcswwi.org

IOWA
Department of
Social Services



Older American's Act

- The Older American's Act is what governs the Aging Unit services and the funding associated with it.
- Purpose:
 - "To improve the quality of life for all older Americans by helping them to remain independent and productive."

Older Americans Act (OAA)

- Title II: Administration on Aging (AoA)
- Title III: Grants for State and Community Programs on Aging
 - Part A - General Provisions
 - Part B - Supportive Services and Senior Centers
 - Part C - Congregate and Home-Delivered Nutrition Services
 - Part D - Disease Prevention and Health Promotion Services
 - Part E - National Family Caregiver Support Program
- Title IV: Training, Research, and Discretionary Projects & Programs
- Title V: Community Service Employment for Older Americans
- Title VI: Grants for Native-Americans
- Title VII: Allotments for Vulnerable Elder Rights Protection Activities

Older Americans Act Title III

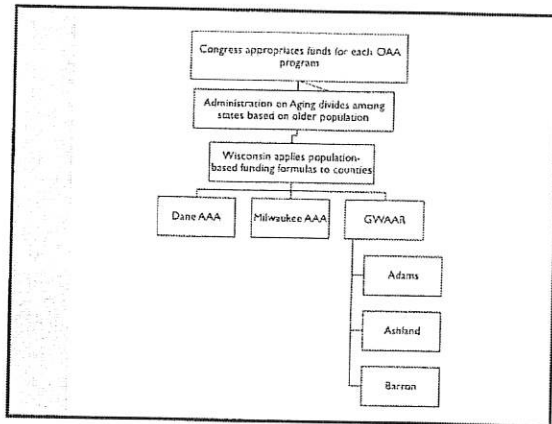
- Special attention to low-income and minority older people living in rural areas
- Special attention to socially and economically needy
- No income or asset test
- People must have the opportunity to contribute but they cannot be charged a fee
- States get funds based on % of nation's population aged 60 and older

Wisconsin Elders Act- 1991 Wisconsin Act 235- Wisconsin Stat. 46.82

- Defined and created the Aging Unit
- Established the powers and duties of the Aging Unit
- Established and defined the Iowa County ADRC Board (formerly the Commission on Aging)
- Created and defined the Aging director position

Wisconsin Elders Act

- Aging/ADRC Board
 - Appointment
 - County board shall appoint Commission on Aging
 - Composition
 - Older adults should make up at least 51% of the membership
 - Elected officials may not make up more than 50%
 - Terms: No more than 2 consecutive 3-year terms for volunteers
 - Powers and Duties
 - Provide recommendations for the planning and development program policies
 - Shall provide input and recommendations for the powers and duties of the aging unit



Title III Part B

- Part B: Supportive Services and Senior Centers
- In Iowa County, we use these funds for Transportation.
 - In addition to Title III-Part B, we apply for this grant in order to operate Driver Escort and the ADRC Care-A-Van: Specialized Transportation Assistance Program for counties (85.21)

Iowa County Transportation

- Volunteer Driver Escort Program
- ADRC Care-A-Van
- Rural ADRC Taxi
- Dodgeville ADRC Taxi



Title III Part C



The Seniors United for Nutrition (SUN) Program operates the nutrition program in Iowa and Lafayette Counties.

Purpose:

- To reduce hunger and food insecurity
- To promote socialization of older individuals
- To promote the health and well-being of older individuals by assisting such individuals to gain access to nutrition and other disease prevention and health promotion services to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior

Title III Part C



• SUN Program Dining Sites:

- 60 or older
- Spouse who attends with their spouse who is 60 or older
- Person under 60 who is disabled and resides in facility in which congregate services are provided (pays full cost of the meal)
- Disabled individual who resides at home with and accompanies older adult to dining center (pays full cost of the meal)

• SUN Home Delivered Meals

- Age 60 or older and homebound
- Spouse of eligible person if in best interest of homebound individual
- Disabled individual who resides with eligible individual (pays full cost of the meal)

Title III Part D



• Part D – Disease Prevention & Health Promotion Services

• Purpose:

- Enable older people to increase control over and to improve their health
- Prevent disease
- Priority to individuals with greatest economic need

- Policy: All Title III-D funding is to be used for Evidence-Based Programming only

Health Promotion Local offerings:

- Stepping On
- Walk with Ease
- Mind Over Matter
- Stand Up and Move More (UW-Extension)
- Strong Bodies (UW-Extension)
- Powerful Tools for Caregivers (ADRC & UW-Extension)

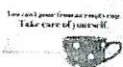


Health Promotion, Continued

- Research Projects
 - Stand Up and Move More
 - Yoga for Seniors
- Evidence Informed
 - Boost Your Brain and Memory
 - Dementia Live
 - Aging Mastery Program (UW-Extension)
- Prevention Partners-
 - Iowa County Health Dept., UW-Extension, Upland Hills Health, Volunteer Facilitators, and the ADRC Region

Title III Part E

- Part E – National Family Caregiver Support Program (NFCSP)
- State Funded - Alzheimer's Family Caregiver Support Program (AFCSP)
- Focus is on supporting the caregiver
- Funds can be spent on the following
 - Respite care and supplemental services
 - Training for caregivers and staff
 - Caregiver support groups
 - Outreach information
 - Presentations/community education



Supportive Home Care Program

- The ADRC operates the Supportive Home Care Program
- This program can offer up to \$150 a month to pay for services like cooking, cleaning, lawn care and snow removal
- There is functional and financial criteria in order to be enrolled



More on the ADRC

- Schedules AARP volunteer tax prep for over 200 individuals each year
- Distributes over 100 Senior Farmers Market Vouchers each year
- Plans and hosts the Health and Wellness Expo each year in September

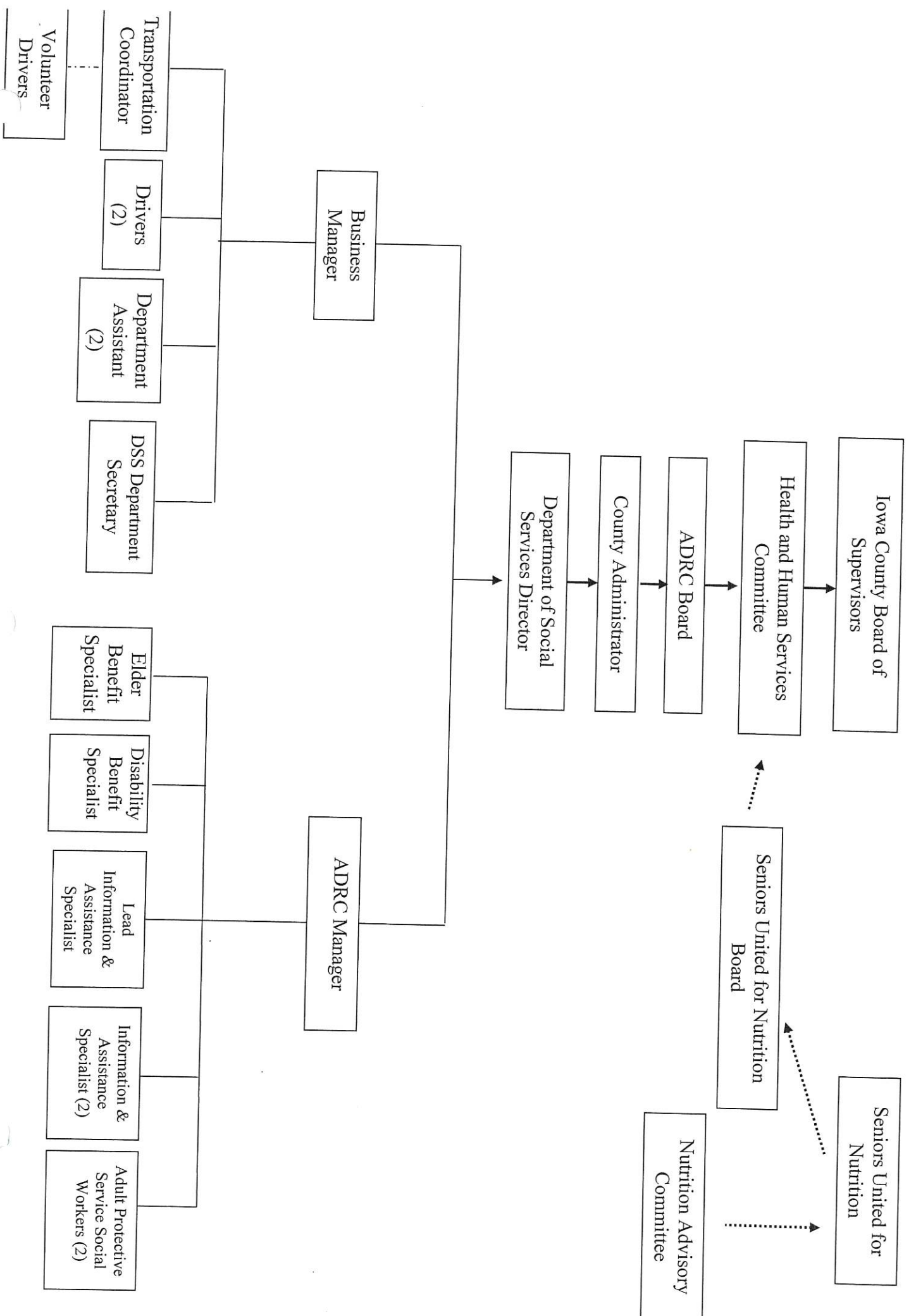
Advocacy

- Consumers and board members are great advocates
 - We will give you information you need to be good advocates or make finding the info easy
 - We will let you know how this issue may impact you
- Research the issue

10/17/2022

Know us before you Need us.







Aging & Disability Resource Center

303 W. Chapel Street, Suite 1300

Dodgeville, WI 53533

Phone: (608) 930-9835 ~ Fax: (608) 935-0355

Valerie Hiltbrand, Manager

ADRC BUS SERVICE AND TAXI SERVICE GUIDELINES

Introduction:

Bus Service

The Aging and Disability Resource Center of Southwest Wisconsin – Iowa County (ADRC) provides bus service transportation to adults age 60 and older and/or individuals with disabilities no matter the age. The bus service will transport passengers to pre-determined destinations on Mondays, Tuesdays, and Thursdays. The bus schedule is published in the monthly “News & Views”, on Facebook, and on the ADRC’s website. Funding for this transportation program is derived from Federal, State, county allocation, and donations. Passengers age 60 and older and/or individuals with disabilities are asked to pay a suggested donation. Passengers under age 60 are required to pay two (2) times the suggested donation. Passengers enrolled in Family Care will be required to have a prior approved authorization from their Managed Care Organization as the ADRC is prohibited from supplanting Federal and State grant monies for transportation services.

Taxi Services

The ADRC provides the Dodgeville Taxi service to all City of Dodgeville residents and the Rural Taxi service to rural Iowa County residents including City of Mineral Point residents. Adults age 60 and older and/or individuals with disabilities no matter their age receive priority service over those under age 60 or non-disabled. Passengers are required to pay a co-payment which is annually established in Iowa County’s Fee Schedule. Passengers enrolled in Family Care will be required to have prior approved authorization from their Managed Care Organization as the ADRC is prohibited from supplanting Federal and State grant monies for transportation services.

Reservation Process:

Bus Service

Bus passengers will need to call in their reservation at least two (2) business days prior to the day they want to ride. Every individual or their caregiver must call the office to sign up for bus trips. Passengers will not call the bus driver to reserve a seat on the bus. Reservations can be made by calling the ADRC office at (608) 930-9835. Normal office hours are Monday through Friday, 8:00 a.m. to 4:30 p.m.

Taxi Services

Individuals wishing to use the Dodgeville Taxi Service will need to call the taxi driver at (608) 553-0590 to arrange a ride. Normal hours of operation for the Dodgeville Taxi Service are Mondays, Wednesdays and Fridays from 7:45 a.m. to 3:30 p.m.

The Rural Taxi Service operates on Tuesdays and Thursdays from 8:15 a.m. to 4:00 p.m. Individuals can call the ADRC office at (608) 930-9835 to schedule a ride for the Rural Taxi Service. The ADRC staff will give the passenger an approximate pick-up time.

Bus Service and Taxi Services

Passengers should expect to be picked up from five (5) minutes before to fifteen (15) minutes after the scheduled pick-up time. In the event it becomes obvious that the actual pick-up time will occur outside of this timeframe, the passenger shall be contacted and provided with a revised pick-up time.

Passengers are required to have a completed registration form on file with the ADRC prior to utilizing the bus and taxi services. Registration forms can be completed in-person at the ADRC office or by telephone. Passengers will be required to read and sign the acknowledgement on last page of this document which states they have read and agree to abide by the rules set forth in this document.

Note: The bus service and taxi services do not operate on Iowa County observed holidays.

Cancellations:

Bus and Rural Taxi passengers must call the ADRC office at (608) 930-9835 to cancel their ride at least one (1) hour before pick up. Normal office hours are Monday through Friday, 8:00 a.m. to 4:30 p.m. If canceling outside of normal business hours, call and leave a message with your name and telephone number. If a passenger fails to cancel their trip or no-shows and the vehicle arrives for pick-up, the driver will wait at least five (5) minutes. The driver will report a no-show to the ADRC office so that we may check on the safety of that passenger.

Service shall be suspended for thirty (30) days if an individual consistently misses five (5) or more scheduled bus or taxi rides within one (1) calendar year, or three (3) or more times within one (1) calendar month. The individual will be notified of the suspension in writing. If the individual disagrees with the suspension decision and an appeal is applicable, our Agency will include an appeals process with the suspension notice letter.

The ADRC reserves the right to cancel the bus and taxi services on short notice due to inclement weather, mechanical issues, nonparticipation (bus service only), or other unforeseen circumstances. There must be a minimum of four (4) passengers utilizing the bus service for each trip; otherwise, the bus service will be canceled for that day. ADRC staff will call passengers to notify them when trips are canceled.

Rules:

- The bus service will provide door-to-door service when the passenger is picked up within the designated route. Passengers residing outside of the designated route may be asked to arrange transportation to a designated pick-up point. The designated routes are determined by the ADRC and may vary from day to day.
- Passengers will not be allowed to board the bus until a pre-trip inspection of the vehicle has been completed.
- The taxi services will provide door-to-door service.
- Seating will be on a first come, first serve basis.
- No eating, drinking, smoking, or vaping on board the bus or taxi.
- No physical or verbal abuse, abusive, badgering, ridiculing, harassing, threatening or obscene language or actions. Should a passenger's actions be so abusive, badgering,

ridiculing, harassing, threatening, or obscene as to constitute a threat or significant concern to other passengers, bus/taxi driver or ADRC staff, the passenger may be asked to leave the vehicle and/or be suspended depending on the severity of their actions. The bus/taxi driver will notify the ADRC office immediately prior to asking the passenger to leave the vehicle.

- No hitting, horseplay, yelling, screaming or swearing allowed.
- No throwing things inside the vehicle or out the windows. No putting body parts (head, hands, arms, etc.) out the windows.
- No inappropriate touching or kissing in the vehicle.
- A criminal act committed by a passenger while they are participating in a bus service outing or while utilizing the taxi service may require the passenger to leave the vehicle and arrange their own transportation. The bus driver will notify the ADRC office immediately prior to asking the passenger to leave the vehicle.
- No operating or tampering with any ADRC bus or taxi equipment.
- No ride will be provided if the passenger appears to be under the influence of alcohol or illegal drugs.
- No playing radios or other electronic equipment without headphones.
- All trash will be collected and deposited in a trash receptacle upon exiting the vehicle by each and every rider.
- Only bring on board what you can carry yourself.
- Each passenger will be allowed a limit of three (3) bags. This limit does not include a purse or handbag.
- No engaging in unauthorized canvassing, soliciting, or distributing of any material.
- Passengers who can sit in a seat must wear a seatbelt.
- Passengers who use wheelchairs must be secured using wheelchair securement straps and a shoulder belt.
- Walkers will be folded and safely secured using securement straps. The bus/taxi driver will assist passengers with the folding and safely securing of walkers.
- Driver will give ample time for passengers to sit before moving the bus/taxi. However, it is the responsibility of the passenger to sit in a secured manner.
- Passengers who wish to donate to the bus service should drop their contribution in the locked box located on the bus.
- Bus passengers under the age of 60 and non-disabled are required to pay for their bus trip in full, two (2) times the donation fee, at the ADRC office and a receipt will be provided.
- Taxi passengers will be required to pay the taxi driver their co-payment at the time services are provided unless prior arrangements have been made with the ADRC office.
- Passengers are never to give the bus/taxi driver gratuities of any kind.
- Passengers must not pose a public health threat. Examples of public health threats include, but are not limited to: the existence of excrement on clothing and/or hands; the existence of other bodily fluids, such as blood or vomit; inappropriate personal hygiene, (i.e., an individual whose bodily hygiene is so offensive as to constitute a nuisance to other passengers or driver).
- Service animals shall be denied access if the service animal is not housebroken, is out of control of the handler and the handler is unable to regain control, or if the service animal poses a direct threat to human health and safety.
- Passengers exposed to or experiencing symptoms of contagious diseases (i.e., flu, cold, COVID-19, pink eye, etc.) should notify the office and cancel their trip.

Failure to comply with the above-stated rules shall result in a suspension of service. The individual will be notified of the suspension in writing. If the individual disagrees with the suspension decision and an appeal is applicable, our Agency will include an appeals process with the suspension notice letter.

All passengers will be required to sign the last page of this document stating the passenger acknowledges that they have received a copy of the ADRC Bus Service and Taxi Service Guidelines.

Non-Discrimination Notice:

Iowa County operates its programs and services without regard to race, color and national origin, in accordance with Title VI of the Civil Rights Act. Any person who believes he or she has been aggrieved by any unlawful discriminatory practice under Title VI may file a complaint with Iowa County.

For more information on Iowa County's civil rights program and the procedures to file a complaint, contact (608) 930-0318.

ADRC BUS SERVICE AND TAXI SERVICE GUIDELINES

I, _____, hereby acknowledge that on this _____ day of _____, 20____, I received a copy of the ADRC Bus Service and Taxi Service Guidelines.

Passenger Signature

Date



DRIVER ESCORT PROGRAM POLICIES AND PROCEDURES: DRIVERS

303 W. Chapel Street; Suite 1300; Dodgeville, WI 53533
Phone: (608) 930-9835

INTRODUCTION

Any person interested in serving Iowa County's residents can apply at the Aging and Disability Resource Center to become a volunteer driver escort. Volunteer Drivers transport any Iowa County resident over the age of 60 and/or individuals with disabilities to non-emergency medical appointments.

VOLUNTEER DRIVER QUALIFICATIONS

Volunteer drivers must have a valid driver's license, keep their vehicle clean, and in good operating condition. All drivers must meet Iowa County's minimum insurance requirements while volunteering for the program.

STEPS TO BECOMING A VOLUNTEER DRIVER ESCORT:

A) APPLICATION FORM

All potential Driver Escort volunteers must complete an application form. All personal information provided on the application form will remain confidential.

B) CERTIFICATION OF ABILITY

The Certification of Ability Form serves as a volunteer job description. The volunteer's physician should read this job description and indicate if they feel the potential volunteer is capable of performing the potential driver escort duties. Since a simple "yes" or "no" is all that is required, most physicians are able to complete this form without a physical examination. However, if a physical is needed, the potential volunteer will be responsible for paying for the physical. A new form will be completed after any type of hospitalization.

C) DRIVING RECORD AND REFERENCE CHECK PERMISSION FORM AND BACKGROUND INFORMATION DISCLOSURE (BID) FORM

The Driving Record and Reference Check Permission Form and Background Information Disclosure Form give the Aging and Disability Resource Center consent to check a driving record with the State Department of Transportation Records Division and to run a criminal background check. There is no legal requirement to consent to this disclosure of information. However, if there is no consent to these disclosures, the Aging and Disability Resource Center will be unable to assess driving ability and, in turn, will prohibit involvement in the driver escort program. Driving records and criminal

background checks will be run every four (4) years and an updated signed form will be required at that time.

D) W-9

The W-9 form is required in order to reimburse mileage. Any mileage reimbursements of \$600 or more are considered taxable income and the volunteer will receive a 1099.

E) PROOF OF INSURANCE

We will need a copy of the volunteer's vehicle Certificate of Insurance. The County requires 100-300-100 coverage of your vehicle. Each time an updated Certificate of Insurance is received, we will need a copy of the coverage for our records.

F) VEHICLE SAFETY CHECK

Prior to application approval, potential volunteers are required to have a safety check completed on their vehicle. A vehicle safety check will be required whenever a new or different vehicle is acquired to use with this program.

G) CONFIDENTIALITY AGREEMENT

Volunteer drivers will sign a Confidentiality Agreement. It is important that the volunteer driver respect the privacy rights of their passengers. All client information will be kept confidential. If you fear for the safety of a client, please inform an Aging and Disability Resource Center staff member who will investigate your concerns.

H) DRIVER ORIENTATION

The Transportation Coordinator will arrange to meet with the new volunteer driver to review policies and procedures. Upon completion of the orientation, the driver will be able to receive driver assignments.

MILEAGE REIMBURSEMENT

Volunteer driver escort mileage over five (5) miles will be paid at the current IRS standard mileage rate. Trips ranging from zero (0) to five (5) miles will be paid at a flat rate of \$3.50 per trip.

Volunteer driver trip mileage will be calculated from the driver escort's home to the client's home and back to the driver's home. The client mileage is calculated from where the client is picked up at their home, taken to their destination, and returned to their home. If there is a waiting period, the driver may drive elsewhere, but **may not** include that mileage on the monthly mileage log. Only mileage pertaining to the Volunteer Driver Escort Program will be reimbursed. **No personal mileage will be allowed.**

Volunteer drivers are to record their actual miles driven on the *Driver Escort Appointment Calendar* under driver mileage. Driver Escort Calendars will be submitted along with all fees collected to the ADRC by the 20th of each month. Mileage reimbursement checks will be mailed the last business day of each month.

MEAL REIMBURSEMENT

Meal reimbursement is available to all drivers outside of Iowa County over the mealtime hours. If the driver escort is out of county between the hours of 6:00 a.m. to 8:00 a.m. (breakfast), 11:00 a.m. to 1:00 p.m. (lunch), and 6:00 p.m. to 8:00 p.m. (dinner), they would be allowed a meal. Meals are reimbursed up to \$8.00 for breakfast, \$12.00 for lunch and dinner.

CALCULATING HOURS OF VOLUNTEER SERVICE

Volunteers are to keep track of their volunteer hours. This is important for us to show the Greater Wisconsin Aging on Agency how much volunteer service are utilized in Iowa County.

GRATUITIES

The driver escorts are **never** to accept gratuities of any kind from the clients.

ACCIDENTS & TICKETS

All traffic violation citations or accidents involving volunteer drivers will be reported to the ADRC Office (608-930-9835). Volunteer drivers will report any moving violations (whether involving a volunteer assignment or not) within 48 hours of the citation. If an accident occurs while transporting clients, it must be reported within 24 hours. If the accident involves any injuries, it must be reported immediately.

RIDE SCHEDULING

Volunteer drivers are not responsible for scheduling transportation services. Clients must schedule their transportation through the ADRC. Volunteers will remind clients to call the ADRC office to schedule transportation if a client tries to schedule a ride with them directly.

The Transportation Coordinator will contact the volunteer driver to provide details about the trip including date, time of appointment, time of pick up, addresses, fee amount to be collected, etc. Volunteers may accept or reject any trip requested. The ADRC Transportation Coordinator will call the client with the name of the driver, pickup time, and expected charge.

In the event of inclement weather, Iowa County ADRC may suspend all services. In most instances, however, the decision to transport an individual rests with the driver. Drivers may have different comfort levels regarding winter driving conditions. The first concern of the program is the safety of both the driver and the client. Therefore, if there is any doubt whether a trip should be taken, do not take the trip. The Transportation Coordinator will make all phone calls regarding the cancellation of rides.

The Aging and Disability Resource Center reserves the right to combine rides whenever possible. Each client will pay based on the round trip mileage from their own pick up point to their own destination. A caregiver who is riding along to help the client will not be charged for riding along with the client.

TRANSPORTING CLIENTS

Volunteer drivers will treat riders with courtesy and respect. Volunteer drivers are responsible for maintaining strict confidentiality. Conversations in the vehicle are to be regarded as confidential both in terms of personal information and in terms of medical information that a client may convey to the driver. In the same manner, transportation provided to clients is a privilege and not a right. Volunteer drivers

should report any problems with clients to the ADRC office. This includes behavior problems, no-shows, and non-payments.

Volunteer drivers may only provide limited help to clients including opening the door for a client, assisting the client if having trouble seeing or uncertain where they are going, or directing them to the right office. This does not include lifting, carrying or balancing clients as they attempt to get in and out of the vehicle. If an individual requires further assistance, it is their responsibility to arrange help and not rely on the driver.

BEHAVIOR

There will be no smoking in the driver escort vehicle while transporting driver escort clients. Volunteers may set their own rules or standards regarding food and beverages in their vehicles.

Abusive behavior toward either the driver or other passengers will not be tolerated. Volunteer drivers will terminate the trip if the client's behavior becomes abusive. Terminating means taking the client to either his or her destination or place of residence, whichever is the closest. The driver should immediately report a terminated trip to the ADRC.

COLLECTING FEES

Co-payments will be submitted for reimbursement by the 20th of the month, along with mileage sheets. If the client fee will be paid by another source such as Family Care, Veterans, etc., the driver will be instructed by the Transportation Coordinator not to collect a fee. Drivers may also send their money collected by mail along with their mileage sheet to:

ADRC - Transportation
303 W. Chapel St.; Suite 1300
Dodgeville, WI 53533

NO-SHOWS

The Transportation Coordinator will give the client an approximate pick-up time. If after waiting ten minutes, the client does not respond or come out of their residence for the ride the driver will report a no-show to the office. At that time, the ADRC will determine whether a safety check will be done for that client.

DRIVERS WHO HAVE HAD A SERIOUS ILLNESS OR HAVE BEEN HOSPITALIZED

When a driver experiences a serious illness or hospitalization, they will be required to have a written excuse from their physician releasing them to come back to their duties as a driver escort.

DRIVER ESCORT TRAININGS AND MEETINGS

Drivers are required to attend annual training. As requested by the Aging and Disability Resource Center, drivers will also attend informational meetings.

TRANSMISSIBLE INFECTION/PUBLIC HEALTH HAZARD

In an effort to ensure the safety of all drivers, clients with transmissible infections and/or public health hazards will not be eligible for use of the driver escort transportation service.



POLICIES AND PROCEDURES

DRIVER ESCORT PROGRAM: CLIENTS

303 W. Chapel Street
Dodgeville, WI 53533
Open Monday-Friday
8am-4:30pm
Phone: (608) 930-9835

INTRODUCTION

All residents over the age of 60 and/or individuals with disabilities may use the Iowa County ADRC Volunteer Driver Escort program for non-emergency medical purposes only. Non-emergency medical appointments include; doctor appointments, dental appointments, picking up prescriptions/glasses or orthotics, counseling and appointments with the staff at the ADRC. All clients are expected to be able to get in and out of a regular passenger car.

The volunteer driver does light services for the client like opening the door and directing clients with visual impairment to their appointment. Under no circumstances is the driver responsible for doing any lifting of any kind. If an individual requires further assistance, it is their responsibility to arrange help and not rely on the drivers. Volunteer drivers may only provide limited help to clients. This does not mean lifting, carrying or balancing clients as they attempt to get in or out of the vehicle.

RIDE SCHEDULING

All clients must schedule their transportation through the Aging and Disability Resource Center (ADRC). This is done for two reasons; first, it allows the transportation coordinator to combine trips, thus saving program money, and second, only authorized trips are covered by the county's liability coverage.

It is the clients' responsibility to notify the ADRC as soon as they know they have a medical appointment. An advanced notice of at least 48 business hours (2 days) for any medical transport is required to ensure there is ample time to coordinate the ride. For example, clients calling on Friday, should not expect a ride for the following Monday. All rides are given on a first come first serve basis. The ADRC will do their best to arrange transportation but can not guarantee there will always be a driver escort available. As the drivers are volunteers and may be unavailable on short notice.

In the event of inclement weather, the ADRC may suspend all services. In most instances, however, the decision to transport an individual rests with the driver. Drivers may have different comfort levels regarding winter driving conditions. The first concern of the program is the safety of both the driver and the client. The volunteer is responsible for calling the ADRC and the ADRC will contact the client to notify them of the cancellation. In the event of inclement weather, it would be good to check the local radio station WDMP (D99.3) for updates as to whether all trips are being canceled or not. As a client, if you have any reservations about riding in inclement weather, please notify the ADRC so the ADRC can contact the driver to notify them of the cancellation.

NO-SHOWS

The ADRC will give the client an approximate pick-up time that the driver will arrive. If the client does not come out for the ride within 10 minutes, the driver will report a no-show to the ADRC to check on the safety of the client.

CANCELLING

If a client needs to cancel their ride, they will call the ADRC at least one hour prior to their scheduled pick-up time. This will allow enough time for staff to cancel the scheduled trip before the driver leaves their home. If less than one hour's notice is given to cancel the trip, the client will be billed for the driver's mileage round trip from their house to the client's.

The following circumstances will result in a three month suspension of services: three cancellations with less than one hour's notice, and three no show reports. During a suspension, the client will need to find their own alternate transportation. Remember, transportation provided to clients is a privilege and not a right.

BEHAVIOR

There will be no smoking in any driver escort vehicle while riding with a driver escort. Volunteers may set their own rules or standards regarding eating and drinking in their own vehicles.

Abusive behavior toward either the driver or other passengers will not be tolerated. Volunteer drivers are instructed to terminate the trip if the client's behavior becomes abusive. Terminating means taking the client to either their destination or place of residence, whichever is closer. The driver will immediately report a terminated trip to the ADRC. The client will then be given a verbal and written warning, advising them that the next time, they will be put on a three month suspension of services, followed by a three month probationary period. During the probationary period the client will be eligible for the driver escort program.

TRAFFIC LAWS

All traffic laws will be followed, including wearing your seatbelt, while participating in our driver escort program.

COLLECTING FEES

Fee co-payments are collected by the drivers on the day of service unless prior arrangements have been made with the ADRC. If the client fee is paid by another source, the driver will be instructed by the ADRC not to collect a fee.

MEALS

Meals are considered a medical stop when the client is a diabetic or has other health concerns and needs to eat at regular times. Each client should let their driver escort know at the beginning of the trip if they will need to make a stop for a meal. Clients are not allowed to buy a meal or snack for the driver escort.

GRATUITIES

The clients are never, under any circumstances, to offer gratuities of any kind to the driver escort.



POLICIES AND PROCEDURES

DRIVER ESCORT PROGRAM: CLIENTS

ACKNOWLEDGEMENT STATEMENT

I acknowledge that I have received a copy of the Driver Escort Program's Policies and Procedures. I understand that if I have questions or concerns at any time about the information, I will contact the ADRC office for clarification. I acknowledge that I have read and understand the policies and procedures.

Client's Signature

Date

Client's Name (Please Print)

2023 APPLICANT INFORMATION FORM

For additional information on this Application Workbook,
please refer to the §85.21 Application Guidelines for CY2023

County of **Iowa**

Primary Contact for this Grant Program

Name **Tom Slaney**
Telephone Number **608-930-9802** Extension
Email Address **tom.slaney@iowacounty.org**

Application Preparer (if different than primary contact)

Name **Nikki Mumm**
Organization **Iowa County Dept of Social Services/Aging & Disability Resource Center**
Telephone Number **608-930-9803** Extension
Email Address **nikki.mumm@iowacounty.org**

Applicant Status

Place your initials in box to the right to certify your eligibility - You are certifying that the applicant is a county government or an agency of the county department. Private non-profits or Aging Units organized as a non-profit under Wis. Stat. 46.82(1)(a)3 are not eligible to apply for this grant.

NM

Organization Info

Place your initials in the box certifying all organization information, including contacts and titles, have been updated in the BlackCat Online Grant Management System (GMS) and are true and correct to the best of your knowledge.

NM

Federal Grant Match

Please place an "X" next to any federal grant that will be using §85.21 funds as local match.

5310 ☐ 5307 ☐ 5311 ☐
Other (Please explain)

Coordination

Please identify the county's coordinated plan name, goal(s) and page number(s) in which your §85.21 project(s) is/are derived.

Title of Coordinated Plan: **Southwestern Wisconsin Locally Developed Coordinated Transit Plan 2019-2023; Iowa County**
The goal(s) and/or strategies from which your project is included: **1. Increase Consumer Awareness of Available Transportation Services.
2. Increase access of transportation in rural Iowa County.
3. Advocate for different forms of transportation.
4. Expand and improve the Driver Escort Program.**
Page number(s) of the Coordinated plan in which the goals may be referenced: **Pages 14-17**

Assessability

Please indicate whether or not §85.21 state aid will be used for the transportation of persons who cannot walk or persons who walk with assistance during the calendar year.

YES ☒ X
NO ☐

(If no, please explain how the Americans with Disabilities Act (ADA) requirements for equivalency of service between ambulatory and non-ambulatory passengers will be met.)

APPLICANT CHECKLIST

County of **Iowa**

Required Components

Complete

Update Contact Information in BlackCat Online Grant Management System	X
Upload completed application workbook:	
Application Information Form	X
Complete Vehicle Inventory <i>(regardless of funding source)</i>	X
Third Party Contracts	X
Trust Fund Plan (for counties with a signed board resolution)	X
Project Descriptions and Budgets	X
Review Summary Tab	X
Upload Transmittal Letter	
Upload Public Hearing and Notice	
Upload Local Review Form	
<u>If applicable</u> : Upload Third Party Contracts &/or Leases to the Resources Tab	

VEHICLE INVENTORY

County of Iowa

Instructions: Please provide your **entire** specialized transit vehicle inventory.
(Include all vehicles used to transport seniors or individuals with disabilities.)

[illegible]

If you have more vehicles than can fit onto one sheet, please add another copy of this sheet.

Right click on the tab, select **Move or Copy, select **Vehicle Inventory**, check the box to **Create a copy**, click **OK**.*

THIRD PARTY PROVIDERS

County of Iowa

Instructions: Please complete the table below for any existing or anticipated third party contracts for your specialized transportation services. Upload a copy of the lease or contract to a folder in the **Resources** tab.
(If there are no projects or vehicles that are contracted or leased out, please put **None** in the first gray box.)

[illegible]

County of Iowa

[illegible]

§ -

<i>Will auto calculate based on year entered above</i>		<i>Enter the amount of funds to be added for the next three years. If none, enter 0.</i>	
Spending plan for 2022 =	\$ -	Funds added for 2022 =	\$2,000.00
Spending plan for 2023 =	\$ -	Funds added for 2023 =	\$2,000.00
Spending plan for 2024 =	\$ -	Funds added for 2024 =	\$2,000.00
		Estimated balance on 12/31/23 =	\$ 2,732.69
		Estimated balance on 12/31/24 =	\$ 4,732.69
		Estimated balance on 12/31/25 =	\$ 6,732.69

Prepared by *Nikki Munro*

CY 2022 Application | Trust Fund 1 of 3

For additional space to complete your narrative, please scroll down to second page.

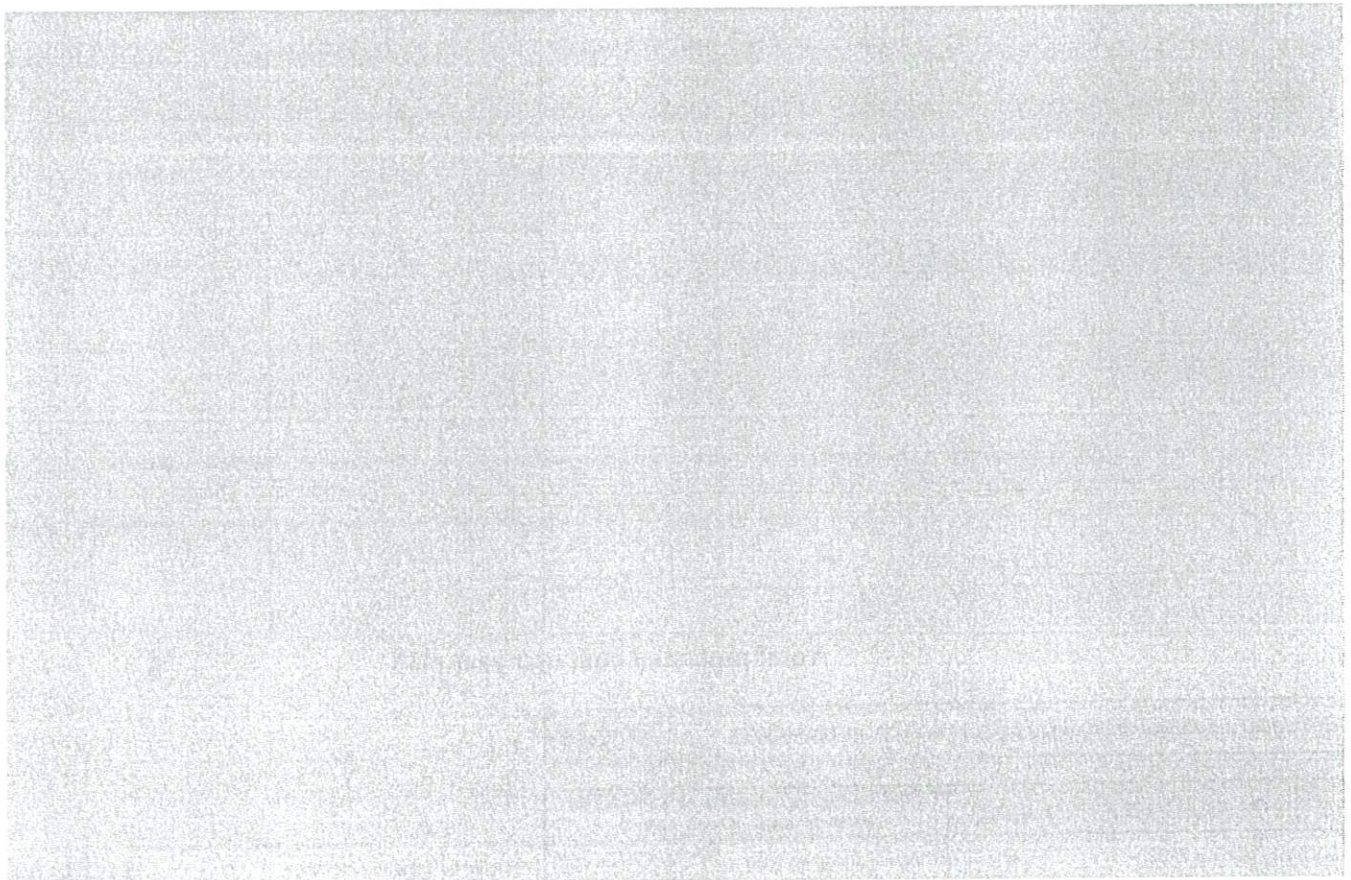
TRUST FUND SPENDING PLAN

Continued

County of **Iowa**

Narrative for non-vehicle equipment purchases continued.

(Hint: Use "ALT" and "Enter" to start a new paragraph.)



PROJECT 1 DESCRIPTION

County of **Iowa**

Instructions

- Use this section to describe a specific project that will use s.85.21 funds.
- Hint: Alt and Enter will go to the next line.
- Be sure to complete all three pages for each project.

Project Name **Driver Escort**

Third Party Provider **N/A**

Date contract last updated

Type of Service

(Place an "x" next to the type of service you will be providing for this project.)

Volunteer Driver	☒	Voucher Program	☐
Vehicle Purchase	☐	Management Study	☐
Planning Study	☐	Brief description of Study	
Other (provide explanation)			

General Project Summary (Provide a brief description of this project. Use ALT and Enter to start a new paragraph.)

The Driver Escort Program operates on a demand response system offering door-to-door service for client's non-emergency medical needs. For those who can walk with or without assistance and transfer to an automobile, we have volunteer driver escorts that utilize their own automobiles to drive our consumers to their non-emergency medical appointments. The Driver Escort Program will transport consumers to non-emergency medical appointments located in medical facilities throughout Iowa County, along with Dane, Grant, Green, Lafayette, Richland, and Sauk Counties in Wisconsin as well as Dubuque, Iowa.

PROJECT DESCRIPTION, Continued

Geography of Service

(List the counties, as well as cities/areas that are serviced through this project. Use ALT and Enter to start a new line.)

Iowa County: Arena, Avoca, Barneveld, Blanchardville, Cobb, Dodgeville, Edmund, Highland, Hollandale, Linden, Mineral Point, Montfort, Ridgeway, Rewey, Muscoda (Iowa County), Montfort (Iowa County), Livingston (Iowa County)

Service Hours (Indicate your general hours of service for this project.)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start Time		8:00 A.M.	8:00 A.M.	8:00 A.M.	8:00 A.M.	8:00 A.M.	
End Time		4:30 P.M.	4:30 P.M.	4:30 P.M.	4:30 P.M.	4:30 P.M.	

Additional description
(if applicable)

The volunteer drivers will drive prior to 8:00 A.M. and later than 4:30 P.M. on an as needed basis.

Service Requests (Briefly describe how your service is requested for this project.)

The consumer will call the ADRC office to request transportation services. A Department Assistant will determine the type of service needed, the services which are available and collect the necessary consumer information needed such as the purpose, destination, name, address, phone number, and any other pertinent information.

Passenger Eligibility (Briefly indicate passenger eligibility requirements for this project.)

The Driver Escort Program provides non-emergency medical transportation to Iowa County residents who are 60 years or older or who are disabled, regardless of their age.

Passenger Revenue (Briefly describe passenger revenue requirements for this project.)

Iowa County requires consumers to pay a co-payment for this service. The co-payment is \$5 - \$20, depending on the consumer's pick up point and destination.

PROJECT BUDGET

Section Description

Amount

Annual Expenditures

Enter the amount of **total** expenditures for this project.

Total Expenses **\$89,261**

Please note: Breakdown of expenses is not required at this time. You will provide the breakdown of actual expenses in the **Annual Financial Report that you will submit at the end of the calendar year.*

Annual Revenue

Enter the amount for **each** funding source that will be used for this project.

**When complete, please scroll to bottom of this page to ensure the Expenditures minus Revenue equals \$0.*

A. \$85.21 funds from annual allocation	Total from A.	\$38,800
B. \$85.21 funds from trust fund	Total from B.	\$23,961
C. County Match Funds	Total from C.	\$10,000
D. Passenger Revenue	Total from D.	
E. Older American Act (OAA) funding	Total from E.	
F. \$5310 Operating or Mobility Management funds	Total from F.	
G. Other funds	Total from G.	\$16,500
<i>(Provide name and/or description and record total amount in the box to the right of the description. Include sources such as other grants and/or programs.)</i>		
1. Iowa County Veteran Service Office	Total	\$8,500
2. Family Care	Total	\$5,500
3. Other Trust Fund	Total	\$2,500
4.	Total	
5.	Total	
6.	Total	

Revenue Total **\$89,261**

Expenditures should equal revenue

\$0

PROJECT 2 DESCRIPTION

County of **Iowa**

Instructions

- Use this section to describe a specific project that will use s.85.21 funds.
- Hint: Alt and Enter will go to the next line.
- Be sure to complete all three pages for each project.

Project Name

ADRC Care A Van (Bus)

Third Party Provider

N/A

Date contract last updated

Type of Service

(Place an "x" next to the type of service you will be providing for this project.)

Volunteer Driver

Voucher Program

Vehicle Purchase

Management Study

Planning Study

Brief description
of Study

Other (provide explanation)

Driver is an employee of Iowa County.

General Project Summary (Provide a brief description of this project. Use ALT and Enter to start a new paragraph.)

The ADRC Care A Van Program is a service in which our bus operates on a regular fixed route system with limited deviations using pick up points and destination points two days per week. Door-to-door service is allowed, if the consumer is within the immediate area of the pickup point or destination point.

PROJECT DESCRIPTION, Continued

Geography of Service

(List the counties, as well as cities/areas that are serviced through this project. Use ALT and Enter to start a new line.)

Arena, Avoca, Barneveld, Blanchardville, Cobb, Dodgeville, Edmund, Highland, Hollandale, Linden, Mineral Point, Montfort, Ridgeway, Rewey, Muscoda (Iowa County), Montfort (Iowa County), Livingston (Iowa County)

Service Hours (Indicate your general hours of service for this project.)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start Time			8:15 A.M.		8:15 A.M.		
End Time			4:00 P.M.		4:00 P.M.		

Additional description
(if applicable)

The ADRC Care A Van will operate past 4:30 P.M. on an as needed basis. Daily schedule may be altered due to programming availability.

Service Requests (Briefly describe how your service is requested for this project.)

The consumer will call the ADRC office to request transportation services. A Department Assistant will collect the necessary information from the consumer such as their name, address, phone number, desired destination(s) and other pertinent information.

Passenger Eligibility (Briefly indicate passenger eligibility requirements for this project.)

The Care-A-Van Program is available to all Iowa County residents who are 60 years or older or who are disabled, regardless of their age.

Passenger Revenue (Briefly describe passenger revenue requirements for this project.)

The Care-A-Van has a recommended voluntary contribution in which consumers are asked, but not required, to pay. The suggested contribution is \$5.00.

PROJECT BUDGET

Section Description

Amount

Annual Expenditures

Enter the amount of **total** expenditures for this project.

Total Expenses **\$48,623**

Please note: Breakdown of expenses is not required at this time. You will provide the breakdown of actual expenses in the **Annual Financial Report that you will submit at the end of the calendar year.*

Annual Revenue

Enter the amount for **each** funding source that will be used for this project.

**When complete, please scroll to bottom of this page to ensure the Expenditures minus Revenue equals \$0.*

A. \$85.21 funds from annual allocation

Total from A. **\$1,600**

B. \$85.21 funds from trust fund

Total from B.

C. County Match Funds

Total from C. **\$4,988**

D. Passenger Revenue

Total from D. **\$500**

E. Older American Act (OAA) funding

Total from E. **\$41,535**

F. \$5310 Operating or Mobility Management funds

Total from F.

G. Other funds

Total from G. **\$0**

(Provide name and/or description and record total amount in the box to the right of the description. Include sources such as other grants and/or programs.)

1.

Total

2.

Total

3.

Total

4.

Total

5.

Total

6.

Total

Revenue Total

\$48,623

Expenditures should equal revenue

\$0

PROJECT 3 DESCRIPTION

County of **Iowa**

Instructions

- Use this section to describe a specific project that will use s.85.21 funds.
- Hint: Alt and Enter will go to the next line.
- Be sure to complete all three pages for each project.

Project Name

Rural Taxi Service

Third Party Provider

N/A

Date contract last updated

Type of Service

(Place an "x" next to the type of service you will be providing for this project.)

Volunteer Driver

Voucher Program

Vehicle Purchase

Management Study

Planning Study

Brief description
of Study

Other (provide explanation)

Driver is an employee of Iowa County.

General Project Summary (Provide a brief description of this project. Use ALT and Enter to start a new paragraph.)

The rural taxi service operates on a demand response system offering door-to-door service. Consumers are transported to destinations of their choice within Iowa County along with out-of-county destinations within 5 miles of the county line [i.e., Montfort (Grant County), Spring Green (Sauk County), Blanchardville (Lafayette County), Muscoda (Grant County)].

PROJECT DESCRIPTION, Continued

Geography of Service

(List the counties, as well as cities/areas that are serviced through this project. Use ALT and Enter to start a new line.)

Service Hours (Indicate your general hours of service for this project.)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start Time			8:15 A.M.		8:15 A.M.		
End Time			4:00 P.M.		4:00 P.M.		

Additional description
(if applicable)

The Rural Taxi Service will operate past 4:00 P.M. on an as needed basis.

Service Requests (Briefly describe how your service is requested for this project.)

The consumer will call the ADRC office to request transportation services for the rural taxi. A Department Assistant will collect the necessary information from the consumer such as their name, address, phone number, desired destinations and other pertinent information.

Passenger Eligibility (Briefly indicate passenger eligibility requirements for this project.)

The rural taxi service will be available to all rural Iowa County residents who are 60 years or older or who are disabled, regardless of their age.

Passenger Revenue (Briefly describe passenger revenue requirements for this project.)

Iowa County requires consumers to pay a co-payment for this service. The co-payment for the rural taxi service is \$2 - \$25, depending on the consumer's pick up point and destination.

PROJECT BUDGET

Section Description

Amount

Annual Expenditures

Enter the amount of **total** expenditures for this project.

Total Expenses **\$37,478**

Please note: Breakdown of expenses is not required at this time. You will provide the breakdown of actual expenses in the **Annual Financial Report that you will submit at the end of the calendar year.*

Annual Revenue

Enter the amount for **each** funding source that will be used for this project.

**When complete, please scroll to bottom of this page to ensure the Expenditures minus Revenue equals \$0.*

A. \$85.21 funds from annual allocation

Total from A. **\$11,197**

B. \$85.21 funds from trust fund

Total from B.

C. County Match Funds

Total from C. **\$20,753**

D. Passenger Revenue

Total from D. **\$3,750**

E. Older American Act (OAA) funding

Total from E. **\$1,778**

F. \$5310 Operating or Mobility Management funds

Total from F.

G. Other funds

Total from G. **\$0**

(Provide name and/or description and record total amount in the box to the right of the description. Include sources such as other grants and/or programs.)

1.

Total

2.

Total

3.

Total

4.

Total

5.

Total

6.

Total

Revenue Total

\$37,478

Expenditures should equal revenue

\$0

PROJECT 4 DESCRIPTION

County of **Iowa**

Instructions

- Use this section to describe a specific project that will use s.85.21 funds.
- Hint: Alt and Enter will go to the next line.
- Be sure to complete all three pages for each project.

Project Name

City of Dodgeville Taxi Service

Third Party Provider

N/A

Date contract last updated

Type of Service

(Place an "x" next to the type of service you will be providing for this project.)

Volunteer Driver

Voucher Program

Vehicle Purchase

Management Study

Planning Study

Brief description
of Study

Other (provide explanation)

Driver is an employee of Iowa County.

General Project Summary (Provide a brief description of this project. Use ALT and Enter to start a new paragraph.)

The City of Dodgeville taxi service will operate on a demand response system offering door-to-door service. Consumers will be transported to the destination(s) of their choice within the Dodgeville city limits.

PROJECT DESCRIPTION, Continued

Geography of Service

(List the counties, as well as cities/areas that are serviced through this project. Use ALT and Enter to start a new line.)

Iowa County – Dodgeville

Service Hours (Indicate your general hours of service for this project.)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start Time		7:45 A.M.		7:45 A.M.		7:45 A.M.	
End Time		3:30 P.M.		3:30 P.M.		3:30 P.M.	

Additional description
(if applicable)

The City of Dodgeville Taxi Service will operate past 3:30 P.M. on an as needed basis.

Service Requests (Briefly describe how your service is requested for this project.)

The consumer will call the taxi driver to request transportation services. The taxi driver will collect the necessary information from the consumer such as their name, address, phone number, desired destination(s) and other pertinent information.

Passenger Eligibility (Briefly indicate passenger eligibility requirements for this project.)

The city taxi service will be available to all residents of the City of Dodgeville who are 60 years or older or who are disabled, regardless of their age.

Passenger Revenue (Briefly describe passenger revenue requirements for this project.)

Iowa County will require consumers to pay a co-payment for this service. The co-payment is \$2 for a one way ride, \$4 for a round trip and \$0.50 for any additional stops.

PROJECT BUDGET

Section Description

Amount

Annual Expenditures

Enter the amount of **total** expenditures for this project.

Total Expenses **\$49,365**

Please note: Breakdown of expenses is not required at this time. You will provide the breakdown of actual expenses in the **Annual Financial Report that you will submit at the end of the calendar year.*

Annual Revenue

Enter the amount for **each** funding source that will be used for this project.

**When complete, please scroll to bottom of this page to ensure the Expenditures minus Revenue equals \$0.*

A. \$85.21 funds from annual allocation	Total from A.	\$28,292
B. \$85.21 funds from trust fund	Total from B.	
C. County Match Funds	Total from C.	\$7,073
D. Passenger Revenue	Total from D.	\$14,000
E. Older American Act (OAA) funding	Total from E.	
F. \$5310 Operating or Mobility Management funds	Total from F.	
G. Other funds	Total from G.	\$0

(Provide name and/or description and record total amount in the box to the right of the description. Include sources such as other grants and/or programs.)

1.		Total	
2.		Total	
3.		Total	
4.		Total	
5.		Total	
6.		Total	

Revenue Total **\$49,365**

Expenditures should equal revenue

\$0

COUNTY ELDERLY TRANSPORTATION 2023 PROJECT BUDGET SUMMARY

County of

Iowa

Project Name	Driver Escort	ADRC Care A Van (Bus)	Rural Taxi Service	City of Dodgeville Taxi Service	0	0	0	0	Totals
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Project Expenses

Total Project Expenses	\$89,261.00	\$48,623.00	\$37,478.00	\$49,365.00	\$0.00	\$0.00	\$0.00	\$0.00	\$224,727.00
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Project Revenue by Funding Source

\$85.21 Annual Allocation	\$38,800.00	\$1,600.00	\$11,197.00	\$28,292.00	\$0.00	\$0.00	\$0.00	\$0.00	\$79,889.00
\$85.21 Trust Fund	\$23,961.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$23,961.00
County funds	\$10,000.00	\$4,988.00	\$20,753.00	\$7,073.00	\$0.00	\$0.00	\$0.00	\$0.00	\$42,814.00
Passenger Revenue	\$0.00	\$500.00	\$3,750.00	\$14,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$18,250.00
Older American Act (OAA)	\$0.00	\$41,535.00	\$1,778.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$43,313.00
\$5310 grant funds	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total from other funds	\$16,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16,500.00
1. Veteran's Service Office	\$8,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,500.00
2. Family Care	\$5,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,500.00
3. Other Trust Fund	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,500.00
4.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Expenses - revenue =	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
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2023 GWAAR Budget

GWAAR requires us to have our budget approved by the ADRC Board prior to submission. We do not have the budget form at this time, so I put together anticipated numbers. I used last years contract amounts to determine this budget.

	IIIB	ARPA B	IIIC1	IIIC2	IIID	ARPA D	IIIE- 60+	IIIE- Grandparent	ARPA E- 60+	ARPA E- Grandparent	NSIP	SSCS	EAN
01- Administration	\$ 10,000	\$ 3,333											
05- Home-Delivered Meals			\$ 31,098	\$ 19,431							\$ 9,002		
08- Congregate Meals			\$ 45,148										
09h- Nutrition Counseling				\$ 500									
10p- Assisted Transportation	\$ 4,200	\$ 1,418										\$ 4,391	
11p- Transportation	\$ 13,990	\$ 4,510										\$ 1,160	
13s- Nutrition Education			\$ 1,500										
16a- Public Information	\$ 2,000												
23a- Health Promotion- Evidence-Based					\$ 2,467	\$ 822							
6503s- Caregiver Support Groups							\$ 300						
6601- Respite, In-Home General Respite							\$ 1,932		\$ 100	\$ 500			
6602- Respite, In-Home Personal Care							\$ 3,187		\$ 500				
6603- Respite, In-Home Homemaker							\$ 4,385		\$ 678				
6604- Respite, In-Home Chore							\$ 260		\$ 50				
6606b- Respite Care, Facility Based Day													
6606c- Respite Care, Facility Based Overnight									\$ 750				
6724- Sup Svcs, Assistive Devices/Technology													
6733- Sup Svcs, Consumable Supplies									\$ 150				
6740- Sup Svcs, Home Security and Safety							\$ 300		\$ 1,000				
6800- Information Services/Public Information							\$ 600						
Elder Abuse							\$ 220						
Grant Total	\$ 30,190	\$ 9,261	\$ 77,746	\$ 19,931	\$ 2,467	\$ 822		11,184	\$				\$ 9,900
County Match	\$ 3,378	\$ 1,026	\$ 8,639	\$ 36,001	\$ 550	\$ 183		4,677	\$	3,728	\$ 9,002	\$ 5,551	\$ 9,900
Grant & Match Total	\$ 33,568	\$ 10,287	\$ 86,385	\$ 55,932	\$ 3,017	\$ 1,005		15,861	\$	5,287	\$ 9,002	\$ 6,168	\$ 66,530

IIIC1 is for congregate meals. We can request up to a 40% transfer from IIIC1 into IIIC2 (Home Delivered Meals). We are guaranteed 15% to transfer, but I would like to request the full 40% as the majority of the meals SUN provides are Home Delivered.

**AGING & DISABILITY RESOURCE CENTER
REVENUE AND EXPENDITURE SUMMARIZATION
AUGUST 2022**

Income **\$38,032.92**

- Income includes ADRC Regional reimbursement, GWAAR reimbursement, driver escort co-payments, reimbursement from Veterans Service Office and Family Care for driver escort rides, bus donations, city taxi payments, and rural taxi payments.

Expenditures **\$48,829.01**

- Expenses include payroll and fringes, office supplies, postage, News & Views publication, City of Dodgeville Taxi expenses, Rural Taxi expenses, ADRC Care-A-Van Bus expenses, volunteer driver reimbursement, caregiver respite, Senior Expo expenses, and delivering meals for Seniors United for Nutrition (SUN).

**AGING & DISABILITY RESOURCE CENTER
REVENUE AND EXPENDITURE SUMMARIZATION
SEPTEMBER 2022**

Income **\$36,089.37**

- Income includes ADRC Regional reimbursement, driver escort co-payments, reimbursement from Veterans Service Office and Family Care for driver escort rides, bus donations, city taxi payments, and rural taxi payments.

Expenditures **\$68,380.91**

- Expenses include payroll and fringes, office supplies, postage, News & Views publication, City of Dodgeville Taxi expenses, Rural Taxi expenses, ADRC Care-A-Van Bus expenses, volunteer driver reimbursement, caregiver respite, and Senior Expo expenses.
 - There were three payrolls in September.

**AGING & DISABILITY RESOURCE CENTER
REVENUE AND EXPENDITURE SUMMARIZATION
2022 QUARTER 3 UNAUDITED**

Income

- Budgeted: \$844,692.00
- Quarter 3 Actual: \$138,291.84
- YTD Actual: \$758,381.35
- Difference: \$86,310.65
- YTD Notes:
 - ADRC Region: \$320,606.54
 - GWAAR: \$15,971.00
 - Levy: \$321,099.00
 - 85.21 Grant: \$79,889.00

Expenditures

- Budgeted: \$844,692.00
- Quarter 3 Actual: \$197,452.95
- YTD Actual: \$530,884.32
- Difference: \$313,807.68
- YTD Notes:
 - SUN (one-time payment) \$34,640.00

Disability Benefit Specialist: Kayla Larson

Elder Benefit Specialist: Renae Kratcha

August 2022 Program Report

This report provides a statistical analysis of benefit specialist (Ben Spec) program services, as reported in the Social Assistance Management System (SAMS) database. The report focuses on legal and benefits-related assistance or "cases." It excludes general information and referral contacts, as well as public and media outreach activities.

NEW CLIENT

A client is defined as a person who had one or more contacts related to a case during the reporting period. A new client is defined as a person whose earliest recorded contact involving legal or benefits-related assistance falls within the reporting period.

Disability Benefit Specialist: 0

Elder Benefit Specialist: 18

CASE

A case is defined as an issue that the Ben Spec helped a client to resolve. Multiple cases may be associated with a single client. A case is regarded as opened when a Ben Spec records the first contact related to an issue. A case is regarded as closed when the last contact related to the issue includes an outcome. A carryover case is a case that was opened prior to the start of the reporting period. A case is regarded as remaining open if it lacks an outcome as of the last day of the reporting period.

Disability Benefit Specialist:

Open Cases: 0 Closed Cases: 0

Elder Benefit Specialist:

Open Cases: 96 Closed Cases: 28

CLIENT CHARACTERISTICS

This report looks at demographic characteristics for all clients who had one or more contacts related to a case during the reporting period.

18-59:

60-69: 22

70-79: 1

80-89: 1

90-99: 0

MONETARY IMPACT

Monetary impact, recorded at time of case closure, is the estimated value of any benefits that a Ben Spec helped a client to obtain or preserve. This report looks at monetary impact for all cases closed during the reporting period.

Disability Benefit Specialist:

Elder Benefit Specialist: **\$408,222.00**

Disability Benefit Specialist: Kayla Larson

Elder Benefit Specialist: Renae Kratcha

September 2022 Program Report

This report provides a statistical analysis of benefit specialist (Ben Spec) program services, as reported in the Social Assistance Management System (SAMS) database. The report focuses on legal and benefits-related assistance or "cases." It excludes general information and referral contacts, as well as public and media outreach activities.

NEW CLIENT

A client is defined as a person who had one or more contacts related to a case during the reporting period. A new client is defined as a person whose earliest recorded contact involving legal or benefits-related assistance falls within the reporting period.

Disability Benefit Specialist: 11

Elder Benefit Specialist: 16

CASE

A case is defined as an issue that the Ben Spec helped a client to resolve. Multiple cases may be associated with a single client. A case is regarded as opened when a Ben Spec records the first contact related to an issue. A case is regarded as closed when the last contact related to the issue includes an outcome. A carryover case is a case that was opened prior to the start of the reporting period. A case is regarded as remaining open if it lacks an outcome as of the last day of the reporting period.

Disability Benefit Specialist:

Open Cases: 41 Closed Cases: 3

Elder Benefit Specialist:

Open Cases: 96 Closed Cases: 27

CLIENT CHARACTERISTICS

This report looks at demographic characteristics for all clients who had one or more contacts related to a case during the reporting period.

30-39 (0-59): 10

50-59: See above*

60-69: 17

70-79: 3

80-89:

90-99:

MONETARY IMPACT

Monetary impact, recorded at time of case closure, is the estimated value of any benefits that a Ben Spec helped a client to obtain or preserve. This report looks at monetary impact for all cases closed during the reporting period.

Disability Benefit Specialist: \$6,258.00

Elder Benefit Specialist: \$236,386.00

Community Outreach and Events:

Date	Topic	Location
September 30, 2022	Senior Expo	Dodgeville, WI

Benefit Specialist Trainings:

Date	Topic
September 20, 2022 and September 21, 2022	DBS Fall Large Group Training
September 29, 2022	EBS Training

Additional Activities and Events:

Date	Topic

ADRC Specialist Report
August 2022
Brittany Mainwaring & Jenny Huffman

Total number of contacts: 416

Encounter Contacts: 318

This number reflects the number calls, walk-ins, scheduled office appointments or home visits for people requesting Information. This information can include private pay resource information, Medicaid basics, application for Medicaid, Food Share, Badger Care, requests for in-home information, etc.

Referrals from Nursing Homes: 0

Scheduled Phone/Virtual/Office Visits: 8

Home Visits: 11

Number of Functional Screens Administered: 6

A functional screen consists of a series of questions about a person daily functioning (i.e. bathing, dressing, eating, chores, decision making etc). Identifying areas of need and the causes of these needs determines a person's functional eligibility for long-term care programs. These screens are usually completed in the client's home and last anywhere from 1½ to 2 hours of face-to-face interview time. Information and Assistance Specialist's then compile medical records and collateral contacts to verify information and enter the screen into a state database. When entering the screen, Information and Assistance Specialist's make detailed notes on every choice and observation placed in the screen. Completion of one functional screen can take up to 8-9 hours.

Number of Nursing Home Relocations: 0

A Nursing Home Relocation means Medical Assistance is paying for a person's stay in the nursing home and they want to discharge back into the community. The individual is able to directly enroll into a long-term care service, either Family Care or IRIS, because they are already receiving Medicaid services. The long-term care program helps them "relocate" back into the community.

Number of People Enrolled in Family Care: 5

Family Care is a program that provides services and supports to people with physical disabilities, developmental disabilities and frail elders. In this area of the state, consumers have the choice between two Managed Care Organizations; Includa and My Choice Wisconsin, which provide the Family Care Program. Their staff in conjunction coordinate the services, which are offered by the Managed Care Organization, with the customer. The Managed Care Organization from their own network of providers purchases these services. Information and Assistance Specialists meet with individuals about to enroll in long-term care to provide needed information for the client to make the decision that fits his/her situation the best.

Number of People Referred to IRIS: 2

IRIS, (Include, Respect, I Self-Direct) is another program which also provides funding for services. In this area of the state, the IRIS program is administered by The Management Group (TMG), Connections and Advocates4U. This is a self-directed program and gives the customer more of the responsibility of choosing providers and managing their own monthly budget. Information and Assistance Specialist's meet with individuals about to enroll in long-term care to provide needed information for the client to make the decision that fits his/her situation the best.

Staff participated in the following events:

Trainings: Estate Recovery; SSA RepPayee

Meetings: Fair Hearing for consumer; Inclusa meeting; Expo Planning meeting; Regional ADRC meeting

Outreach Events: Planning for the Health & Wellness Expo on 09/30/22; Fair Street Apartment outreach

Key:

CCoT- County Communities on Transition

DSS- Department Social Services

IEP- Individualized Education Program

IRIS- Include, Respect, I Self Direct

MCO- Managed Care Organization

MDS Q- Minimum Data Set

ADRC Specialist Report
September 2022
Brittany Mainwaring & Jenny Huffman

Total number of contacts: 377

Encounter Contacts: 274

This number reflects the number calls, walk-ins, scheduled office appointments or home visits for people requesting Information. This information can include private pay resource information, Medicaid basics, application for Medicaid, Food Share, Badger Care, requests for in-home information, etc.

Referrals from Nursing Homes: 1

Scheduled Phone/Virtual/Office Visits: 14

Home Visits: 10

Number of Functional Screens Administered: 6

A functional screen consists of a series of questions about a person daily functioning (i.e. bathing, dressing, eating, chores, decision making etc). Identifying areas of need and the causes of these needs determines a person's functional eligibility for long-term care programs. These screens are usually completed in the client's home and last anywhere from 1½ to 2 hours of face-to-face interview time. Information and Assistance Specialist's then compile medical records and collateral contacts to verify information and enter the screen into a state database. When entering the screen, Information and Assistance Specialist's make detailed notes on every choice and observation placed in the screen. Completion of one functional screen can take up to 8-9 hours.

Number of Nursing Home Relocations: 0

A Nursing Home Relocation means Medical Assistance is paying for a person's stay in the nursing home and they want to discharge back into the community. The individual is able to directly enroll into a long-term care service, either Family Care or IRIS, because they are already receiving Medicaid services. The long-term care program helps them "relocate" back into the community.

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Staff participated in the following events:

Activities: Prevention-Stepping On workshop

Trainings:

Meetings: HeART Coalition; CCOT meeting

Outreach Events: Iowa County Fair; Health and Wellness Expo

Key:

CCoT- County Communities on Transition

DSS- Department Social Services

IEP- Individualized Education Program

IRIS- Include, Respect, I Self Direct

MCO- Managed Care Organization

MDS Q- Minimum Data Set

TRANSPORTATION COORDINATOR'S REPORT

August 2022

Submitted by

DRIVER ESCORT SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	165	1,470	136	\$933.00
Current Month	2021	YTD	2022	YTD
Driver Escort Fees Deposited:	\$1,579.28	\$14,925.62	\$1,542.86	\$11,260.86

ADRC TAXI SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	218	1,965	166	2,168
Current Month	2021	YTD	2022	YTD
ADRC Taxi Fees Deposited:	\$336.25	\$7,574.88	\$245.30	\$3,441.40

- We averaged 10.43 Taxi riders per day.

RURAL TAXI SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	45	494	48	512
Current Month	2021	YTD	2022	YTD
ADRC Taxi Fees Deposited:	\$156.25	\$1,480.25	\$220.25	\$2,483.25

- We averaged 2.67 Taxi riders per day.

CARE A VAN SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	0	0	67	67
Current Month	2021	YTD	2022	YTD
Donations Collected:	\$0.00	\$0.00	\$70.00	\$70.00
Current Month	2021	YTD	2022	YTD
Total Days Cancelled:	0	0	5	5

- We averaged 2.84 Care A Van riders per trip. (All bus trips in 2021 canceled due to Pandemic.)

TRANSPORTATION COORDINATOR'S REPORT

September 2022

Submitted by Nohe Caygill

DRIVER ESCORT SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	181	1,651	115	1,048
Current Month	2021	YTD	2022	YTD
Driver Escort Fees Deposited:	\$2,525.76	\$17,451.38	\$1,277.37	\$12,538.23

ADRC TAXI SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	247	2,212	206	2,374
Current Month	2021	YTD	2022	YTD
ADRC Taxi Fees Deposited:	\$376.50	\$7,951.38	\$315.25	\$3,756.65

- We averaged 9 Taxi riders per day.

RURAL TAXI SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	71	565	85	597
Current Month	2021	YTD	2022	YTD
ADRC Taxi Fees Deposited:	\$131.00	\$1,611.25	\$356.85	\$2,840.10

- We averaged 4.72 Taxi riders per day.

CARE A VAN SERVICES

Current Month	2021	YTD	2022	YTD
Total Units of Service Provided:	0	0	31	98
Current Month	2021	YTD	2022	YTD
Donations Collected:	\$0.00	\$0.00	\$125.00	\$195.00
Current Month	2021	YTD	2022	YTD
Total Days Cancelled:	0	0	2	7

- We averaged 4.43 Care A Van riders per trip. (All bus trips were suspended in 2021 due to Pandemic)



ADRC Manager's Report

October 2022 ADRC Board Meeting

The ADRC office in Iowa County is fully staffed!

Medicare Prescription Drug open enrollment started October 15 and runs through December 7. Our Elder Benefit Specialist will be focusing on this during the fall.

Our Elder Benefit Specialist held a Medicare 101 presentation at the Dodgeville Library on 8/30/22 and on 10/5/22 at the Barneveld Library. They were both well attended. This is great for people who are getting ready to retire. The next Medicare 101 will be held virtually on 12/19/22.

We are working with Upland Hills Health on ways to partner in order to provide community education about Medicare.

Senior Farmers Market Vouchers have to be used by October 31st. Participants who received these vouchers, can use it towards \$25 of local produce. This program is not only beneficial to the participants but to the local farmers as well.

The Drive Thru Health and Wellness Expo was held on Friday, 9/30/22. We partnered with Upland Hills Health. This year, Upland Hills Health will be offered a Chair Exercise Demonstration and a Meditation Exercise during the Expo. The Iowa County Health Department offered COVID vaccines. Over 200 people participated in the event. We hope to be able to offer an in-person Expo in 2023!

Recent offerings by the Dementia Care Specialists include:

- Caregiver Educational Series: Caregiver, Karen Stobbe spoke at an event in Dodgeville on September 8th at Hidden Valley Church. She led an interactive presentation about caregiving.
- A virtual Book Club, featuring a book called "Mom's Gone Missing," by Susan Marshall.
- Savvy Caregiver; a structured workshop for family caregivers of persons with dementia.
-

Upcoming Dementia & Caregiver Programming:

- The ADRC Dementia Care Specialists have started a Brain Health Bulletin which is an email listserv that the community can join to get current information from the ADRC's Dementia Care Specialists. They have also started a podcast called, "The Resilient Caregiver." These new items are featured in the upcoming News and Views.

- On October 27th, the Dementia Care Specialists will be hosting a virtual Dementia Research Update.
- The ADRC Dementia Care Specialists along with the local ADRC will be hosting a Dementia Live event at the Health and Human Services Building on November 15th. Please consider attending. It is an exercise that brings awareness to what a person with dementia may be experiencing.
- The ADRC Dementia Care Specialists are planning a very special, multi-generational event for early November. In each of the four counties, they will be hosting a play, called "Grandpa and Lucy." People of all ages are invited to attend. The goal is to promote awareness and reduce stigma of dementia. This is a great conversation starter for families and our community. Please join us for the Iowa County event, which will be hosted by the ADRC at the Mineral Point Opera House on Tuesday, November 1 at 5:30pm.

November is National Family Caregiver Month. We will be offering an in-person Caregiver Renewal Day on Friday, November 18th.

"Mug Club for Caregivers" meets on the third Tuesday of the month from 10:30-11:30, hosted by our Caregiver Coordinator and the regional Dementia Care Specialist. They are currently offering a hybrid meeting so attendees can chose Zoom or in-person.

You can find FREE telephone caregiver trainings at: www.caregiverteleconnection.org

Advocacy:

Rural Older Adult Advisory Board: The Veterans Service Office and ADRC helped the UW School of Nursing to recruit 10 RURAL people who are over the age of 65 to be a part of this board. The group started meeting in September for Orientation and the group will start meeting with researchers in December. I will share more information as the group continues to meet.

Community Health Needs Assessment: The ADRC is participating in the Community Health Needs Assessment which is spearheaded by Upland Hills Health Hospital and the Iowa County Health Department. The focus areas have been determined as: Transportation, Aging Concerns, Mental Health/Addiction Services and Healthy Living (Obesity, Physical Activity). A full copy of this assessment will be posted on the Upland Hills Health website.

Respectfully submitted,

Valerie Hiltbrand, ADRC Manager
ADRC of Southwest Wisconsin
303 W. Chapel St.
Dodgeville, WI 53533
Telephone 608-930-9835
Fax 608-935-0355
www.adrcswwi.org