

	AGENDA - ADRC of Southwest WI-Iowa County Board Tuesday, August 27, 2024, at 10:00 a.m. Conference Call: 1-312-626-6799 Zoom Meeting ID: 848 6041 8996 Passcode: 638947 https://us02web.zoom.us/j/84860418996 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 August 27, 2024, meeting.		
4	Approve the minutes of the July 23, 2024, meeting.		
5	Report from committee members and an opportunity for members of the audience to address the committee. No action will be taken.		
6	Introduction of New ADRC Board Member(s)		
7	Possible Action Item: Review 2025-2027 Aging Unit Plan DRAFT. Send to HHS Committee for approval.		
8	Review ADRC Monthly Financial Summaries. No action will be taken. a) June b) July		
9	SUN Update		
10	Benefit Specialist Update a) July		
11	ADRC Specialist Update a) July		
12	Transportation Update a) July		
13	ADRC Manager: a) ADRC Managers Report b) Advocacy Updates		
14	Set next meeting date: Tuesday, September 24, 2024, at Health & Human Services Center, 303 W. Chapel Street, Dodgeville, WI 53533. 10:00 a.m. Zoom will still be an option.		
15	Adjournment.		
	Posting verified by: ADRC Date: 8.09.2024 Initials: NM		

July 2024

State of
Wisconsin
County of
Iowa

**UNAPPROVED MINUTES OF THE ADRC OF SOUTHWEST WISCONSIN
IOWA COUNTY BOARD MEETING HELD
TUESDAY, JULY 23, 2024, AT 10 A.M.
HEALTH & HUMAN SERVICES CENTER
303 W. CHAPEL ST., DODGEVILLE, WI 53533**

2024-07

1.	Call to Order Chairman Stevens called the meeting to order at 10:00 a.m.
2.	Roll Call Members Present in Community Room: Doug Richter, Dan Nankee, Brad Stevens, W. Michael Britt, Dianne Evans (left at 10:55 a.m.), Dawn Kabot, Elsie Jane Murphy (joined at 10:06 a.m.), J. Patrick Reilly, Susan Schroeder, Marilyn Rolfsmeyer Members Present Remotely: Kari Wunderlin Members Excused: Alice Fischer, Tim Whisler Others Present in Community Room: Valerie Hiltbrand, Nikki Mumm, Mel Masters (left at 10:55 a.m.)
3.	Agenda Approval Approval of this July 23, 2024, Agenda. Motion by Nankee and seconded by Reilly to accept the agenda. Motion carried.
4.	Meeting Minutes Approval Approval of the May 28, 2024, meeting minutes. Motion by Britt and seconded by Reilly to accept the meeting minutes. Motion carried. Chairman Stevens would like to add "Respectfully Submitted By: Nikki Mumm, Business Manager" to the bottom of the minutes.
5.	Report from committee members and an opportunity for members of the audience to address the committee. <i>Nankee-</i> He highlighted a couple articles in the News & Views and shared that Grant County is opening back up their meal site in Muscoda.
6.	Introduction of New ADRC Board Member(s) Hiltbrand shared the County Board approved new board member, Tim Whisler. He was unable to be here today therefore we will need to do an introduction at next meeting.
7.	Action Item: Screen prospective ADRC Board applicants and present recommendations to the County Administrator for appointment, subject to confirmation by the County Board. Motion by Evans and seconded by Reilly to recommend Todd Novak to the County Administrator for appointment to the ADRC Board. Motion carried.
8.	Social Services & ADRC 2023 Annual Report Report provided in the packet. Nankee shared with the Board that 2023 Expenses and Revenues are higher due to the SUN Contract. Stevens inquired about why citizens are on the Supportive Home Care and Caregiver Support Program waitlist and what we can do about it. Hiltbrand shared what the programs provide and the funding sources as well as staff capacity to serve clients.
9.	ADRC 101 Presentation Hiltbrand provided the presentation in the packet and presented along with Mumm.
10.	Review ADRC Monthly Financial Summaries Mumm provided the report in packet and presented.
11.	SUN Update Andrew Hodgeson, Interim SUN Director, provided a report in the packet. Masters, SUN Board Chairman, presented. The new Director, Chris Baird, will be starting in about a week, and Hodgeson will be assisting through the transition. There is a SUN Board meeting tonight in Darlington. They are financially on thin ice, but adjustments are coming. They have over 100 volunteers between both counties. Evans shared she delivers to concerned citizens and wants to know that they will still be able to receive meals. Masters said they have a plan to continue to serve clients.

12.	Benefit Specialist Update Benefit Specialists provided a report in the packet. Hiltbrand presented.
13.	ADRC Specialist Update ADRC Specialists provided a report in the packet. A revised June 2024 report was distributed at the meeting. Hiltbrand presented.
14.	Transportation Update Nohe Caygill, Transportation Coordinator, provided a report for the packet. Mumm presented and shared information on the Find Your Own Driver Program. Board suggested giving the Find Your Own Driver Program a try.
15.	ADRC Manager Report: Hiltbrand provided a report in packet and presented. Working on draft Aging Plan. Still have Senior Farmers Market Vouchers available. She shared upcoming events highlighting the Health and Wellness Expo at Hidden Valley Church on Friday, September 13, 2024.
16.	Next Meeting Tuesday, August 27, 2024 , approved for the next ADRC Board meeting. 10:00 a.m., HHS Center, Community Room, Dodgeville. Zoom is still an option.
17.	Adjourn Motion by Nankee and seconded by Reilly to adjourn. Motion carried. Meeting adjourned at 11:12 a.m.
Respectfully Submitted by: Nikki Mumm, Business Manager, & Valerie Hiltbrand, ADRC Manager	

Iowa County Aging Plan

2025-2027



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Executive Summary

The Aging and Disability Resource Center of Southwest Wisconsin, or ADRC, located in Iowa County, includes the input of older adults in order to develop a County Plan on Aging, every three years. This is a mandate of the Older American's Act to secure funding. This plan also outlines an agenda for developing and strengthening current Older American's Act programs to meet the needs of older people in Iowa County.

The local ADRC is accountable for the implementation of programs for older individuals and adults with disabilities who are residing in Iowa County, Wisconsin. Our mission and focus are to help keep older adults and those with disabilities independent and safe in their homes through the delivery of services provided by the agency and through assistance in identification and connection to appropriate resources.

While the ADRC located in Iowa County serves the residents of Iowa County, it also works closely with the other counties included in the regional ADRC of Southwest Wisconsin: Grant, Green, and Lafayette counties. The ADRC has worked hard to develop relationships with new and different agencies, businesses, civic groups, and faith-based organizations of the community. During the 2025-2027 Aging Plan period, the ADRC will continue to focus on strong community partnerships in order to meet the needs of the aging community.

The ADRC is continuously looking for feedback from the community and customers on our services. Since the summer of 2023, the ADRC has been specifically collecting public input from Iowa County residents through public forums, surveys, and one-on-one conversations. There have been opportunities to do this verbally and in writing. AARP assisted the ADRC in distributing surveys to participants of the Free Tax Prep. There was also an online option, mail-in option or in-person option for the survey. ADRC staff completed one-on-one conversations with 13 residents. The ADRC Board was invited to gather information from the areas of the community that they represent. The ADRC and Seniors United for Nutrition offered a listening session to give residents an opportunity to discuss their needs and preferences.

The ADRC is looking forward to addressing the following goal areas during this plan cycle:

- Title IIIB Supportive Services and Person-Centered Services
- Title IIIC Nutrition Services
- Title IIIE Caregiver Services and Barriers to Equity
- Title IIID Health Promotion Services
- Advocacy

Executive Summary Cont.

Goal: The ADRC will mitigate feelings of isolation and loneliness among seniors by facilitating enjoyable and interactive outings in a supportive group setting.

Goal: The ADRC will offer more prevention programs in Iowa County.

Goal: The ADRC will provide opportunities for caregiver support to all caregivers, including those who are low income. This will include providing education, socialization and awareness of community resources.

Goal: The ADRC will educate older adults and their caregivers about advocacy issues and opportunities.

Goal: The Seniors United for Nutrition Program (SUN) will implement a Volunteer Transportation Program to support dine-in services within three years.

Context

Iowa County is located in southwestern Wisconsin, consisting mostly of small towns. The County's largest city and the county seat is Dodgeville, located near the center of the county. Dodgeville is located 46 miles west of Madison and 49 miles northeast of Dubuque, Iowa. According to: [Iowa, Wisconsin | County Health Rankings & Roadmaps](#):

	County	Wisconsin
<u>Population **</u>	23,865	5,892,539
<u>% Below 18 Years of Age **</u>	21.4%	21.1%
<u>% 65 and Older **</u>	20.8%	18.7%
<u>% Non-Hispanic Black **</u>	0.9%	6.3%
<u>% American Indian or Alaska Native **</u>	0.3%	1.2%
<u>% Asian **</u>	0.9%	3.2%
<u>% Native Hawaiian or Other Pacific Islander **</u>	0.1%	0.1%
<u>% Hispanic **</u>	2.3%	7.6%
<u>% Non-Hispanic White **</u>	94.3%	80.1%
<u>% Not Proficient in English **</u>	0%	1%
<u>% Female **</u>	49.1%	49.8%
<u>% Rural **</u>	79.3%	32.9%

** Use caution if comparing these data with prior years



Context Cont.

According to County Population Projections Through 2040, there were approximately 6,775 individuals 60 and older residing in Iowa County in the year 2020. Similar to most counties in the state, this number is expected to rise over the next 15 years. It is estimated that in the year 2025, there will be 7,850 individuals 60 and older. By 2035, it is estimated that there will be 8,710 individuals 60 and older.

According to Wisconsin County Profiles of Persons Ages 65 and Older, the median age of Iowa County residents is 43.5 years old. There are 4,576 people who are 65 and older. Of that population, 48.4% identify as males and 51.6 % identify as females. There are 4,457 households in Iowa County that have one or more people 60 years and older. The percent of households with a member 60 and older is 45.5 percent.

One thousand three hundred and sixty-six individuals over the age of 65 reside alone; which is about 29.9% of the aging population in Iowa County. This number demonstrates the significant need for caregivers who support these individuals who wish to remain “aging in place” in their communities.

23.7 percent of those over 65 are still employed. The median household income in Iowa County is \$79,226. For those 65 years and over, the median household income is \$52,432. 11.3 percent of individuals 65 and over are living in poverty in Iowa County.

According to the Department of Health Services: Estimated and Projected Population Ages 65 and Older with Dementia Living in Households in Wisconsin Counties, 2010-2040: In 2025, Iowa County is estimated to have 597 people ages 65 and older living with dementia. Projection for 2030 is 733 and 2040 is 969 people.

Context Cont.

According to 2024 [Iowa, Wisconsin | County Health Rankings & Roadmaps](#), adult smoking is at 15%, adult obesity is at 34% and excessive drinking is at 24% of the county's population. The percentage of the population under age 65 without health insurance in Iowa County is five percent, which is slightly below the state and national average. The ratio for patient to primary care physician is 1,980:1, which is greater than the state and national average. Dentist to patient ratio is 1,840:1, which is also greater than the state and national average. Mental health providers are available at a 1,140:1 ratio, which is greater than the state and national average.

Iowa County has one hospital within the county. The hospital has multiple clinics throughout and near Iowa County. Within the [Upland Hills Health 2019-2021 Community Health Needs Assessment](#) the top five healthcare priorities that were identified were: Mental Health and Alcohol/Drug Abuse/Misuse, Access to Transportation, Healthy Eating/Weight Loss and Exercise (Healthy Living), and Aging Concerns. The ADRC partners with and supports Upland Hills Health in these priorities. Through this collaboration, Healthy Iowa County has been initiated by the Iowa County Health Department. The ADRC collaborates on working on these goals with the Iowa County Health Department and Upland Hills Health. Visit healthyiowacounty.org for more information.

The American Association of Retired Persons (AARP) has developed a "livability index" to compare neighborhoods across the country. This index can be found at: [Iowa County, Wisconsin – AARP Livability Index](#)

Iowa County has a livability score of 52 out of 100, which is in the top half of communities in Wisconsin. The index takes into consideration housing, neighborhood, transportation, environment, health, engagement and opportunity. The scoring is based on comparing communities to one another. The areas where Iowa County scored the lowest were neighborhood and transportation. The areas that Iowa County scored the highest were opportunity and housing.

Community Involvement in the Development of the Aging Plan

Community Engagement Report-2024 Survey Results

Your County or Tribe: Iowa County	Date/s of Event or Effort: Feb-May 2024
Target Audience(s): Adults	Number of Participants/Respondents: 113
Describe the method used including partners and outreach done to solicit responses: This year, because we did not have the COVID Vaccine cincs available to distribute surveys, we partnered with AARP. They distributed them to consumers as they waited for their tax appointments. An ADRC incentive was offered if they agreed to complete the survey. The same survey was offered online to Iowa County residents and was printed in the April and May editions of the News & Views. A small amount of surveys were completed online or by mail.	
Describe how the information collected was used to develop the plan: The survey questions were tailored to request information for the purposes of developing goals for each of the required goal areas. We purposely did not request only 60+ population to complete the survey so that we could capture what our future 60+ population will want. The survey asked for participants to select multiple choice or True/False. In addition, there was a spot to fill in more information. The multiple choice and True/False were helpful to capture what the larger group was interested in. The additional comments section was helpful to get more specific details and ideas about their suggestions, questions or concerns.	

What were the key takeaways/findings from the outreach? Of the 113 surveys completed: 49% identified themselves as living alone 82.1% identified themselves as a caregiver 93% identified that they have what they need to live safely and independently in their home This will provide an overview of top answers for the multiple choice questions: Where do you gather information about your county's programs and services? 59.6% Newspaper 23.2% Facebook 23.2% Website The top three services that consumers have received from the ADRC or SUN Programs: Dine in or Home Delivered Meals Help applying for Medicaid Help finding resources The top three challenges for older adults living in Iowa County: Transportation, Finding in-home support, and Nutrition/food resources The top three challenges for adults with disabilities living in Iowa County: Mental health, Transportation and Housing	
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Community Involvement in the Development of the Aging Plan

Community Engagement Report-2023 Survey Results

Your County or Tribe: Iowa County	Date/s of Event or Effort: Summer 2023
Target Audience(s): Iowa County residents	Number of Participants/Respondents: 60
Describe the method used including partners and outreach done to solicit responses: The ADRC did some outreach at local events during summer of 2023. This opportunity was used to survey Iowa County residents at that time. The events included Dodgeville Town Square Pop-Up Event, Mineral Point Street Day and the Iowa County Fair. An ADRC incentive was offered, if they agreed to complete the survey.	
Describe how the information collected was used to develop the plan: The survey questions were tailored to request information for the purposes of developing goals for each of the required goal areas. We purposely did not request only 60+ population to complete the survey so that we could capture what our future 60+ population will want. The survey asked for participants to select multiple choice or True/False. In addition, there was a spot to fill in more information. The multiple choice and True/False were helpful to capture what the larger group was interested in. The additional comments section was helpful to get more specific details and ideas about their suggestions, questions or concerns.	

What were the key takeaways/findings from the outreach?

Of the 60 surveys completed:

86.7% were over the age of 60
11.3% were 18-59 with a disability
16.7% identified themselves as a caregiver

The top three areas that respondents would like to learn about:

52.2% Healthy Aging
41.3% Scam Prevention
34.8% Nutrition

The top three issues facing older adults and adults with disabilities:

60.5% being able to stay in own home
55.8% Affordable Healthcare
48.8% Dementia

Summary of the biggest challenges to remaining in your home:

Cost of help in the home
Money, store access in small towns
Inflation, support for caregiving
Shop groceries, drive and help

Summary of resources that would be helpful in the next 5-10 years, to support independent living:

Transportation, Nutrition/food resources/grocery delivery, and in-home adaptations and support.

Community Involvement in the Development of the Aging Plan

Community Engagement Report-Listening Session

Your County or Tribe: Iowa County	Date/s of Event or Effort: 3/26/2024
Target Audience(s): Iowa County residents	Number of Participants/Respondents: 13
Describe the method used including partners and outreach done to solicit responses: The ADRC and SUN Program held a Community Listening session, right after an ADRC Board Meeting. There were 13 people in attendance. The ADRC gave a brief presentation and provided lunch for participants. Then, the participants discussed the focus areas and documented their discussions. At the end of the listening session, the participants shared out their answers, allowing others to provide feedback. This was a very interactive and engaged group of older adults from Iowa County.	
Describe how the information collected was used to develop the plan: This information was very helpful. The group was very active and engaged. Not only did they write their suggestions down on paper, but they took the time to share them with the group which allowed for additional feedback.	

What were the key takeaways/findings from the outreach?

The main themes and discussion points for this event were:

Volunteering: Recruit younger people to volunteer for such things as driving. By doing this, it would "provide a lifetime of giving!"

Socialization: Somehow create activities for people with common interests. Maybe call it, "Meet Up". These activities could even be used to empower people and for them to keep their current skills. Loneliness is an issue!! Somehow encourage socialization for all. Would need to secure a congregate site maybe through the churches. Program ideas: Bingo, board games, puzzles, etc. Maybe even do some sort of an intergenerational event.

Access to exercise opportunities for older adults (low cost and accessible).

Volunteer Drivers: Somehow start a directory of people who would be willing to drive individuals to events. Publicize the availability of rides. For example, voting. It was further mentioned that advertising can occur on the local TV stations through PSA's.

Advertising!! There is concern that a big problem for our seniors is that they are unaware of what is all available to them. Many events are advertised in the News & Views, but it is suspected that many do not look at it when it arrives in the Shopper.

Educational opportunities for the older generation regarding scams, or other topics.

Community Involvement in the Development of the Aging Plan

Community Engagement Report-Conversations

Your County or Tribe: Iowa County	Date/s of Event or Effort: Spring/Summer 2024
Target Audience(s): Iowa County residents	Number of Participants/Respondents: 8
Describe the method used including partners and outreach done to solicit responses: The ADRC contacted eight participants for one-on-one conversations about aging related needs in Iowa County.	
Describe how the information collected was used to develop the plan: Participants noted on their paper survey that they would be willing to discuss aging-related needs with an ADRC worker. ADRC worker contacted them by phone.	

What were the key takeaways/findings from the outreach?

Resources needed to age safely in Iowa County?

Housework assistance, meal preparation help, taxi service that runs every day, Advanced Directive workshop, having good muscle tone, balance, being involved in the community, eating vegetables and being able to see family, more nursing homes, assistance with vacuuming and cleaning, more socialization, accessible homes and adaptations, better walking areas, public pools designed for older adults, weekend transportation, lack of activities for older adults, assistance with housing.

What aging healthy means?

Having good support services around to help one age, socialization, Meal sites, education on technology.

Positives about living in Iowa County?

Farmers markets and summer concerts
Taxi services
Geography, services and the people in the area
Community garden
Library services
Open spaces (can see the sky)

Public Hearing Requirements

Public Hearing is scheduled for:

Date: Wednesday, September 25, 2024

Time: 1:00 p.m.

Address:

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

Location:

Conference Room 1001



Goals & Strategies for the Plan Period

Title III-B Supportive Services and Person Centeredness

Goal: The ADRC will mitigate feelings of isolation and loneliness among seniors by facilitating enjoyable and interactive outings in a supportive group setting.

- **Specific:** Provide bi-monthly event trips designed to foster social connections and reduce loneliness.
- **Measurable:** Conduct surveys pre- and post-trip to measure a 20% increase in reported social satisfaction and decrease in loneliness.
- **Achievable:** Utilize feedback from participants to continually improve the trips.
- **Relevant:** Directly impacts the emotional well-being of seniors.
- **Time-bound:** Launch the program within three years; including planning, implementation and evaluation.

Title III-C Nutrition Program

Goal: The Seniors United for Nutrition Program (SUN) will implement a Volunteer Transportation Program to support dine-in services within three years.

- **Specific:** Develop a volunteer driver program to provide transportation to and from dining sites.
- **Measurable:** Track the number of volunteers recruited and the number of rides provided.
- **Achievable:** Partner with local high schools, colleges, and community groups to recruit volunteers.
- **Relevant:** Improves accessibility to dining sites and enhances the dining experience for participants.
- **Time-bound:** Launch the program within three years; including planning, implementation and evaluation.

Title III-D Evidence Based Health Promotion

Goal: The ADRC will offer more prevention programs in Iowa County.

- **Specific:** Iowa County will partner with Green County Health and Wellness Coordinator to offer 2 in-person prevention classes in Iowa County annually. All Green County virtual classes will be marketed in Iowa County.
- **Measurable:** Track the number of participants in required database.
- **Achievable:** Counties will collaborate on choosing the best evidence-based prevention class to offer based on need. Counties will collaborate on marketing efforts for both in-person and virtual classes.
- **Relevant:** Increases access to healthy aging and improved health.
- **Time-bound:** Launch the program within three years; including planning, implementation and evaluation.

Goals & Strategies for the Plan Period...Cont.

Title III-E Caregiver Supports and Equity

Goal: The ADRC will provide opportunities for caregiver support to all caregivers, including those who are low income. This will include providing education, socialization and awareness of community resources.

Specific: Expand the Caregiver Coalition by 50%. The ADRC will partner with the Caregiver Coalition to plan and implement an annual caregiver educational event, with at least 10 community members in attendance. The Caregiver Coalition will engage with low-income populations by marketing these events at local food pantries, with Economic Support and the Free Clinic.

- **Measurable:** Track the number of active participants in the Caregiver Coalition and educational events.
- **Achievable:** Partner with local agencies on the Caregiver Coalition to implement strategies.
- **Relevant:** Empowers caregivers of any income status to continue to provide vital supports to care recipients.
- **Time-bound:** Launch the program within three years; including planning, implementation and evaluation.



Goals & Strategies for the Plan Period...Cont.

Advocacy Goal

Goal: The ADRC will educate older adults and their caregivers about advocacy issues and opportunities.

- **Specific:** The ADRC will use the News & Views and the ADRC website to educate older adults and their caregivers about advocacy topics and opportunities.
- **Measurable:** Track the number of articles in required database.
- **Achievable:** The ADRC will utilize the News & Views and the ADRC website to create an Advocacy Corner, where readers can go to find information on important topics related to aging, disabilities and caregivers.
- **Relevant:** Improves knowledge and empowers older adults and caregivers to advocate for what they need.
- **Time-bound:** Launch the program within three years; including planning, implementation and evaluation.

Coordination Between Title III and Title VI

All ADRC Services are available to members of any tribe. In an effort to outreach to tribal members, the ADRC will publish educational materials about these services in the News & Views newsletter.

Emergency Preparedness

The ADRC has a Continuity of Operations Plan (COOP) developed. Additionally, the ADRC consults with Iowa County Emergency Management and other county departments on the COOP and any other emergency preparedness needs.



Organization, Structure and Leadership of the Aging Unit

MISSION STATEMENT:

The Aging and Disability Resource Center of Southwest Wisconsin is dedicated to providing older adults and people with physical or developmental/intellectual disabilities with the resources needed to live with dignity and security, and achieve maximum independence and quality of life. The goal of the ADRC is to empower individuals to make informed choices and to streamline access to the appropriate services and supports.

Address of the Aging Unit:

ADRC of Southwest Wisconsin, Iowa County
303 W. Chapel St., Suite 1300
Dodgeville, WI 53533

Hours of Operation:

8:00 a.m. – 4:30 p.m.
Monday through Friday

Helpful Telephone Numbers and Email Addresses:

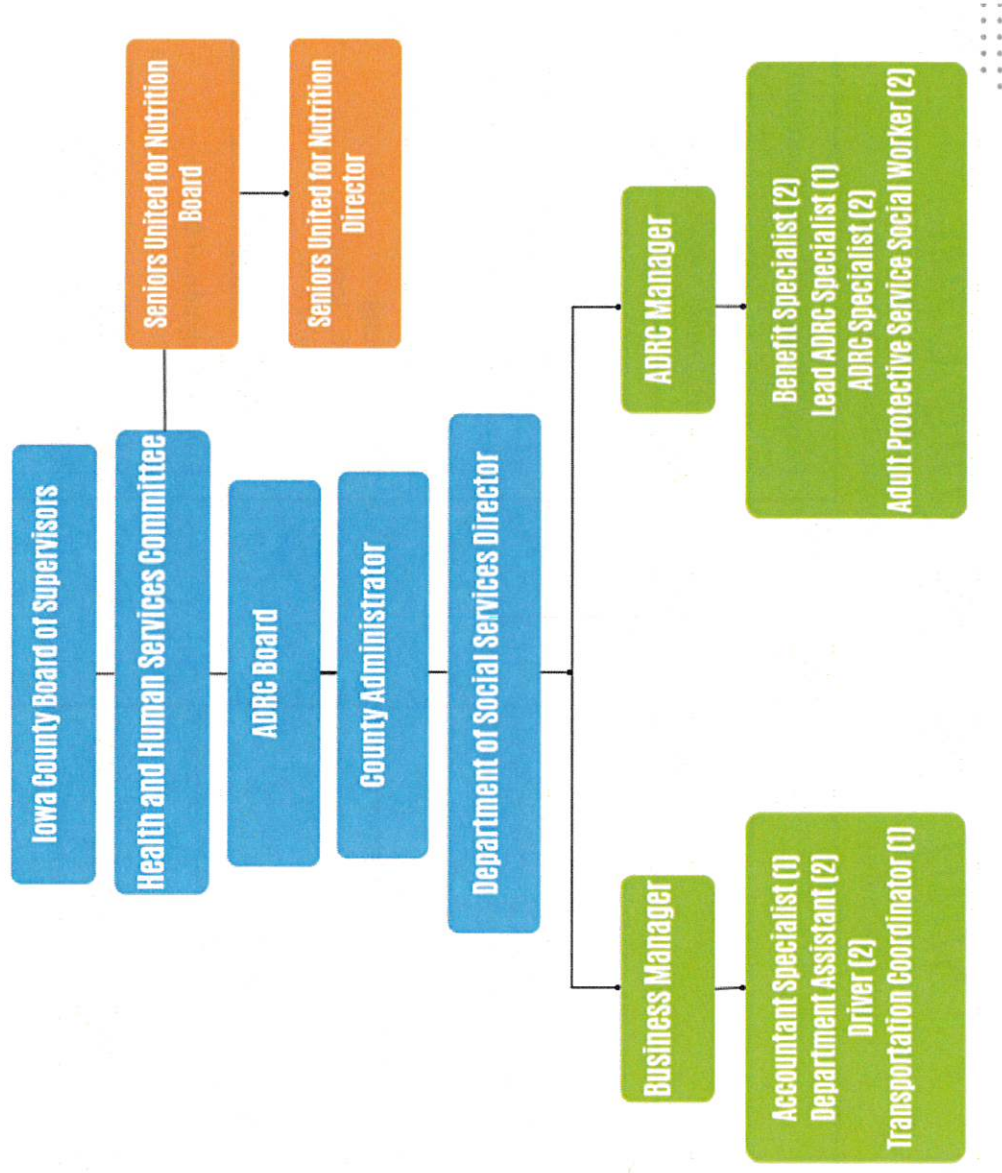
Valerie Hiltbrand, ADRC Manager
valerie.hiltbrand@iowawacounty.org
Telephone: (608) 930-9835
Fax: (608) 935-0355

Tom Slaney, Director
Iowa County Department of Social Services
tom.slaney@iowawacounty.org
Telephone: (608) 930-9802
Fax: (608) 935-9754

Primary Contact to Respond to Questions About the Aging Plan Template:

Valerie Hiltbrand, ADRC Manager
ADRC of Southwest Wisconsin, Iowa County
valerie.hiltbrand@iowawacounty.org
Telephone: (608) 930-9835
Fax: (608) 935-0355

Organizational Chart of the Aging Unit



Staff of the Aging Unit

Listed below are the people employed by the County Aging Unit.

Valerie Hiltbrand ADRC Manager (608) 930-9835 valerie.hiltbrand@iowacounty.org	Brief Description of Duties: This full-time position is responsible for administering the programs that operate under the Aging and Disability Resource Center of Southwest Wisconsin in Iowa County. This position also leads planning activities, supervises employees, develops and implements policies, and assists with the development of budgets.
Jenny Huffman Information & Assistance Specialist (608) 930-9835 jenny.huffman@iowacounty.org	Brief Description of Duties: This full-time position provides knowledge and research into all available options for individuals seeking information. This position is active in education and outreach activities and completes functional screens that determine an individual's eligibility to access Family Care and IRIS services. In addition, the Lead I&A Specialist acts as the person responsible for assuring the quality for functional screens.

Paige Bittner and Laura Coulthard Information & Assistance Specialist (608) 930-9835 Paige.Bittner@iowacounty.org, Laura.Coulthard@iowacounty.org	Brief Description of Duties: This full-time position provides knowledge and research into all available options for individuals seeking information. This position is active in education and outreach activities and completes functional screens that determine an individual's eligibility to access Family Care and IRIS services.
Renae Kratcha Elder Benefit Specialist (608) 930-9835 renae.kratcha@iowacounty.org	Brief Description of Duties: This full-time position assists people age 60 years or older to understand and successfully navigate the benefit programs. This includes, but is not limited to, facilitating Healthy Living with Diabetes, Medicare, SSI, SSA, Senior Care, housing issues, insurance issues, and Medicare Part D.

Staff of the Aging Unit Cont.

Listed below are the people employed by the County Aging Unit.

Michelle Leffler Disability Benefit Specialist (608) 930-9835 Michelle.Leffler@iowacounty.org	Brief Description of Duties: This full-time position assists people ages 17.5-59 to understand and successfully navigate the benefit programs. This includes, but is not limited to, Medicaid, Medicare, SSI, SSA, housing issues, insurance issues, and Medicare Part D.
Vacant Department Assistant (608) 930-9835	Brief Description of Duties: This full-time position oversees and edits the agency newsletter, assists with the transportation program, greets customers by phone and in person and directs them to the appropriate staff, completes minutes and reports for the local ADRC board, marketing projects, maintains the website and Facebook pages, and assists the ADRC with other projects as needed. This position is also largely responsible for planning the Iowa County Health and Wellness Expo and Senior Farmer Market Voucher implementation.

Nohe Caygill Department Assistant/Transportation Coordinator (608) 930-9835 Nohe.caygill@iowacounty.org	Brief Description of Duties: This full-time position is responsible for overseeing the day-to-day operation of the taxi, bus, and driver escort program, volunteer driver recruitment and training, and scheduling. This individual also prepares reports and assists with other ADRC activities as needed.
Shelley Reukauf, Nikki Brennum and Kayla Larson Adult Protective Service Social Worker (608) 930-9822 shelley.reukauf@iowacounty.org , Nikki.brennum@iowacounty.org , Kayla.Larson@iowacounty.org	Brief Description of Duties: This full-time position is responsible for administering the Supportive Home Care Program, perform elder abuse and neglect investigations, and assist individuals and their families with guardianships and protective placements. This position is also responsible for implementing a Stepping On Program, Tai Chi Program and facilitating the County I-Team meetings.

Staff of the Aging Unit Cont.

Listed below are the people employed by the County Aging Unit.



Rose Erickson, Delena Buchanan
Public Transportation Driver
(608) 930-9835
rose.erickson@iowacounty.org,
delena.buchanan@iowacounty.org

Brief Description of Duties:

Taxi Driver:

This full-time position is responsible for driving the taxi on both the Rural Taxi route and the City of Dodgeville route. Rural Taxi rides are dispatched by the office staff while the driver organizes City of Dodgeville rides. The ADRC Care-A-Van operates two trips per month.



Aging Unit Coordination with ADRCs

In Iowa County, the Aging Unit and the Aging and Disability Resource Center are integrated. By definition, both are integrated within the ADRC, co-located in the same office, and both are managed by the same individual, and the budget is submitted as a single entity to the county. Staff is led as one united unit and work together cohesively, often teaming cases to best meet the needs of the customer and their families. Marketing, outreach, and advocacy are all completed as one entity. This includes all Aging Unit staff, ADRC staff, and Adult Protective Services staff.

This unit is also under the umbrella of the Iowa County Department of Social Services. An ADRC Manager oversees the staff and programming, but also reports to the Director of Social Services. Department Assistants are shared within the Department of Social Services and are cross-trained so that coverage for the ADRC reception area is always available. The Business Manager supervises Department Assistants.

The local ADRC services are also part of a regional ADRC service area of four counties total (Iowa, Grant, Green and Lafayette), in which a Regional Manager provides oversight, guidance, and monitors contractual compliance. This arrangement has many advantages due to the ability to work fluidly across county lines and to expand programs that may be limited due to the constraints of small rural counties. It also allows trained staff to be available to back-up neighboring counties where staff turnover or other leaves of absences may be occurring.

While the local county structure reports monthly to a local ADRC Board, made up of local consumers and county board supervisors as is required by the Older American's Act, it also reports quarterly to the Iowa County Health and Human Services committee, as well as a Regional ADRC Governing Board.

As it has been since the ADRC was first incorporated into the Commission on Aging in Iowa County in 2009, the goals of this plan will be shared goals of the whole organization and will reflect the mission of the agency.



Statutory Requirements for the Structure of the Aging Unit

Chapter 46.82 of the Wisconsin Statutes sets certain legal requirements for aging units. Consider if the county or tribe is in compliance with the law. If the aging unit is part of an ADRC the requirements of 46.82 still apply.

Organization: The law permits one of three options. Which of the following permissible options has the county chosen?	Check One
(1) An agency of county/tribal government with the primary purpose of administering programs for older individuals of the county/tribe.	
(2) A unit, within a county/tribal department with the primary purpose of administering programs for older individuals of the county/tribe.	X
(3) A private, nonprofit corporation, as defined in s. 181.0103 (17).	

Organization of the Commission on Aging: The law permits one of three options. Which of the following permissible options has the county chosen?	Check One
For an aging unit that is described in (1) or (2) above, organized as a committee of the county board of supervisors/tribal council, composed of supervisors and, advised by an advisory committee, appointed by the county board/tribal council. Older individuals shall constitute at least 50% of the membership of the advisory committee and individuals who are elected to any office may not constitute 50% or more of the membership of the advisory committee.	X
For an aging unit that is described in (1) or (2) above, composed of individuals of recognized ability and demonstrated interest in services for older individuals. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.	
For an aging unit that is described in (3) above, the board of directors of the private, nonprofit corporation. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.	
Full-Time Aging Director: The law requires that the aging unit have a full-time director as described below. Does the county have a full-time aging director as required by law?	Yes

Role of the Advisory Committee

Where an aging unit has both an advisory committee (sometimes referred to as the advisory council) and a policy-making body, a key role of the advisory committee is to advise the policy-making body in the development of the plan and to advocate for older adults. Evidence of this involvement should be listed as an attachment in the appendices of the aging unit plan.

Membership of the Advisory Committee

An aging advisory committee is required if the commission (policy-making body) does not follow the Elders Act requirements for elected officials, older adults, and terms, or if the commission is a committee of the county board (46.82 (4) (b) (1)). If the aging unit has an advisory committee, list the membership of the advisory committee using the template provided below and include in the body of the aging plan. Older individuals shall constitute at least 50% of the membership of the advisory committee and individuals who are elected to any office may not constitute 50% or more of the membership of the advisory committee. There are no term limit requirements on advisory committees.



Official Name of the County Aging Unit's Advisory Committee: Iowa County Board

Name	Age 60 and Older	Elected Official	Start of Service
Chairperson: Brad Stevens		Yes	2023
Doug Richter	X	Yes	2024
Dan Nankee	X	Yes	2024
Kari Wunderlin		No	2023
J. Patrick Reilly	X	No	2018
Dianne Evans	X	No	2017
Marilyn Rolfsmeier	X	No	2020
Elsie Jane Murphy	X	No	2019
Dawn Kabot	X	No	2023
Alice Fischer	X	No	2022
W. Michael Britt	X	No	2021
Susan Schroeder	X	No	2021
Timothy Whisler	X	No	2024
Todd Novak		No	2024

Role of the Policy-Making Body

The policy-making body, also called the commission on aging, must approve the aging unit plan. Evidence of review and approval of the draft and final version of the aging unit plan must be included as part of the plan. Attach the evidence of this required involvement as an appendix to the aging plan.

Membership of the Policy-Making Body

The commission is the policy making entity for aging services (46.82 (4) (a) (1)) and an aging advisory committee is not the commission. List the membership of the aging unit's policy-making body using the template provided below and include in the body of the aging plan. There are term limits for the membership of the policy-making body.



Official Name of the County Aging Unit's Policy-Making Body: Health & Human Services Committee

Name	Age 60 and Older	Elected Official	Year First Term Began
Chairperson: Dan Nankee	N/A	Yes	N/A
Joan Davis	N/A	Yes	N/A
Justin O'Brien	N/A	Yes	N/A
Richard Rolfsmeyer	N/A	Yes	N/A
Dody Cockeram	N/A	Yes	N/A
Bruce Paull	N/A	Yes	N/A

Budget Summary

The aging unit is required to submit an annual budget to the AAA using a budget worksheet approved by Bureau of Aging and Disability Resources (BADR). Will complete this section when 2025 GWAAR allocations have been released.

Verification of Intent

The purpose of the Verification of Intent is to show that county government has approved the plan. It further signifies the commitment of county government to carry out the plan. Copies of approval documents must be available in the offices of the aging unit.

Use the template provided below and include in the body of the aging plan.

Verification of Intent Template

The person(s) authorized to sign the final plan on behalf of the commission on aging and the county board must sign and indicate their title. This approval must occur before the final plan is submitted to the AAA for approval.

In the case of multi-county aging units, the verification page must be signed by the representatives, board chairpersons, and commission on aging chairpersons, of all participating counties.

We verify that all information contained in this plan is correct.

Signature and Title of the Chairperson of the Commission on Aging	Date
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Signature and Title of the Authorized County Board Representative	Date
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The applicant certifies compliance with the following regulations:

1. Legal Authority of the Applicant

- The applicant must possess legal authority to apply for the grant.
- A resolution, motion or similar action must be duly adopted or passed as an official act of the applicant's governing body, authorizing the filing of the application, including all understandings and assurances contained therein.
- This resolution, motion or similar action must direct and authorize the person identified as the official representative of the applicant to act in connection with the application and to provide such additional information as may be required.

2. Outreach, Training, Coordination & Public Information

- The applicant must assure that outreach activities are conducted to ensure the participation of eligible older persons in all funded services as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.
- The applicant must assure that each service provider trains and uses elderly persons and other volunteers and paid personnel as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.
- The applicant must assure that each service provider coordinates with other service providers, including senior centers and the nutrition program, in the planning and service area as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.

- The applicant must assure that public information activities are conducted to ensure the participation of eligible older persons in all funded services as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.

3. Preference for Older People with Greatest Social and Economic Need

The applicant must assure that all service providers follow priorities set by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging for serving older people with greatest social and economic need.

4. Advisory Role to Service Providers of Older Persons

The applicant must assure that each service provider utilizes procedures for obtaining the views of participants about the services they receive.

5. Contributions for Services

- The applicant shall assure that agencies providing services supported with Older Americans Act and state aging funds shall give older adults a free and voluntary opportunity to contribute to the costs of services consistent with the Older Americans Act regulations.

The applicant certifies compliance with the following regulations:

- Each older recipient shall determine what he/she is able to contribute toward the cost of the service. No older adult shall be denied a service because he/she will not or cannot contribute to the cost of such service.
- The applicant shall provide that the methods of receiving contributions from individuals by the agencies providing services under the county/tribal plan shall be handled in a manner that assures the confidentiality of the individual's contributions.
- The applicant must assure that each service provider establishes appropriate procedures to safeguard and account for all contributions.
- The applicant must assure that each service provider considers and reports the contributions made by older people as program income. All program income must be used to expand the size or scope of the funded program that generated the income. Nutrition service providers must use all contributions to expand the nutrition services. Program income must be spent within the contract period that it is generated.

6. Confidentiality

- The applicant shall ensure that no information about, or obtained from an individual and in possession of an agency providing services to such individual under the county/tribal

or area plan, shall be disclosed in a form identifiable with the individual, unless the individual provides his/her written informed consent to such disclosure.

- Lists of older adults compiled in establishing and maintaining information and referral sources shall be used solely for the purpose of providing social services and only with the informed consent of each person on the list.
- In order that the privacy of each participant in aging programs is in no way abridged, the confidentiality of all participant data gathered and maintained by the State Agency, the Area Agency, the county or tribal aging agency, and any other agency, organization, or individual providing services under the State, area, county, or tribal plan, shall be safeguarded by specific policies.
- Each participant from whom personal information is obtained shall be made aware of his or her rights to:
 - (a) Have full access to any information about one's self which is being kept on file;
 - (b) Be informed about the uses made of the information about him or her, including the identity of all persons and agencies involved and any known consequences for providing such data; and,
 - (c) Be able to contest the accuracy, completeness, pertinence, and necessity of information being retained about one's self and be assured that such information, when incorrect, will be corrected or amended on request.

The applicant certifies compliance with the following regulations:

- All information gathered and maintained on participants under the area, county or tribal plan shall be accurate, complete, and timely and shall be legitimately necessary for determining an individual's need and/or eligibility for services and other benefits.
- No information about, or obtained from, an individual participant shall be disclosed in any form identifiable with the individual to any person outside the agency or program involved without the informed consent of the participant or his/her legal representative, except:
 - (a) By court order; or,
 - (b) When securing client-requested services, benefits, or rights.
- The lists of older persons receiving services under any programs funded through the State Agency shall be used solely for the purpose of providing said services, and can only be released with the informed consent of each individual on the list.
- All paid and volunteer staff members providing services or conducting other activities under the area plan shall be informed of and agree to:

- (a) Their responsibility to maintain the confidentiality of any client-related information learned through the execution of their duties. Such information shall not be discussed except in a professional setting as required for the delivery of service or the conduct of other essential activities under the area plan; and,
- (b) All policies and procedures adopted by the State and Area Agency to safeguard confidentiality of participant information, including those delineated in these rules.

- Appropriate precautions shall be taken to protect the safety of all files, microfiche, computer tapes and records in any location which contain sensitive information on individuals receiving services under the State or area plan. This includes but is not limited to assuring registration forms containing personal information are stored in a secure, locked drawer when not in use.

7. Records and Reports

- The applicant shall keep records and make reports in such form and requiring such information as may be required by the Bureau of Aging and Disability Resources and in accordance with guidelines issued solely by the Bureau of Aging and Disability Resources and the Administration on Aging.
- The applicant shall maintain accounts and documents which will enable an accurate review to be made at any time of the status of all funds which it has been granted by the Bureau of Aging and Disability Resources through its designated Area Agency on Aging. This includes both the disposition of all monies received and the nature of all charges claimed against such funds.

8. Licensure and Standards Requirements

- The applicant shall assure that where state or local public jurisdiction requires licensure for the provision of services, agencies providing services under the county/tribal or area plan shall be licensed or shall meet the requirements for licensure.

The applicant certifies compliance with the following regulations:

- The applicant is cognizant of and must agree to operate the program fully in conformance with all applicable state and local standards, including the fire, health, safety and sanitation standards, prescribed in law or regulation.

9. Civil Rights

- The applicant shall comply with Title VI of the Civil Rights Act of 1964 (P.L. 88-352) and in accordance with that act, no person shall on the basis of race, color, or national origin, be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination under any program or activity under this plan.
- All grants, sub-grants, contracts or other agents receiving funds under this plan are subject to compliance with the regulation stated in 9 above.
- The applicant shall develop and continue to maintain written procedures which specify how the agency will conduct the activities under its plan to assure compliance with Title VI of the Civil Rights Act.
- The applicant shall comply with Title VI of the Civil Rights Act (42 USC 2000d) prohibiting employment discrimination where (1) the primary purpose of a grant is to provide employment or (2) discriminatory employment practices will result in unequal treatment of persons who are or should be benefiting from the service funded by the grant.
- All recipients of funds through the county/tribal or area plan shall operate each program or activity so that, when viewed in its entirety, the program or activity is accessible to and usable by handicapped adults as required in the Architectural Barriers Act of 1968.

10. Uniform Relocation Assistance and Real Property Acquisition Act of 1970

- The applicant shall comply with requirements of the provisions of the Uniform Relocation and Real Property Acquisitions Act of 1970 (P.L. 91-646) which provides for fair and equitable treatment of federal and federally assisted programs.

11. Political Activity of Employees

- The applicant shall comply with the provisions of the Hatch Act (5 U.S.C. Sections 7321-7326), which limit the political activity of employees who work in federally funded programs. [Information about the Hatch Act is available from the U.S. Office of Special Counsel at <http://www.osc.gov/>]

12. Fair Labor Standards Act

- The applicant shall comply with the minimum wage and maximum hours provisions of the Federal Fair Labor Standards Act (Title 29, United States Code, Section 201-219), as they apply to hospital and educational institution employees of state and local governments.

13. Private Gain

- The applicant shall establish safeguards to prohibit employees from using their positions for a purpose that is or appears to be motivated by a desire for private gain for themselves or others (particularly those with whom they have family, business or other ties).

The applicant certifies compliance with the following regulations:

14. Assessment and Examination of Records

- The applicant shall give the Federal agencies, State agencies and the Bureau of Aging and Disability Resources Resource's authorized Area Agencies on Aging access to and the right to examine all records, books, papers or documents related to the grant.
- The applicant must agree to cooperate and assist in any efforts undertaken by the grantor agency, or the Administration on aging, to evaluate the effectiveness, feasibility, and costs of the project.
- The applicant must agree to conduct regular on-site assessments of each service provider receiving funds through a contract with the applicant under the county or tribal plan.

15. Maintenance of Non-Federal Funding

- The applicant assures that the aging unit, and each service provider, shall not use Older Americans Act or state aging funds to supplant other federal, state or local funds.
- The applicant must assure that each service provider must continue or initiate efforts to obtain funds from private sources and other public organizations for each service funded under the county or tribal plan.

16. Regulations of Grantor Agency

The applicant shall comply with all requirements imposed by the Department of Health and Family Services, Division of Supportive Living, Bureau of Aging and Disability Resources concerning special requirements of federal and state law, program and fiscal requirements, and other administrative requirements.

17. Older Americans Act

Aging Units, through binding agreement/contract with an Area Agency on Aging must support and comply with following requirements under the Older Americans Act (Public Law 89-73) [As Amended Through P.L. 116-131, Enacted March 25, 2020] Reference: 45 CFR Part 1321 – Grants to State and Community Programs on Aging.

Sec. 306. (a)

(1) provide, through a comprehensive and coordinated system, for supportive services, nutrition services, and, where appropriate, for the establishment, maintenance, modernization, or construction of multipurpose senior centers (including a plan to use the skills and services of older individuals in paid and unpaid work, including multigenerational and older individual to older individual work), within the planning and service area covered by the plan, including determining the extent of need for supportive services, nutrition services, and multipurpose senior centers in such area (taking into consideration, among other things, the number of older individuals with low incomes residing in such area, the number of older individuals who have greatest economic need (with particular attention to low income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) residing in such area, the number of older individuals who have greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural

The applicant certifies compliance with the following regulations:

areas) residing in such area, the number of older individuals at risk for institutional placement residing in such area, and the number of older individuals who are Indians residing in such area, and the efforts of voluntary organizations in the community), evaluating the effectiveness of the use of resources in meeting such need, and entering into agreements with providers of supportive services, nutrition services, or multipurpose senior centers in such area, for the provision of such services or centers to meet such need;

(2) provide assurances that an adequate proportion, as required under section 307(a)(2), of the amount allotted for part B to the planning and service area will be expended for the delivery of each of the following categories of services-

(A) services associated with access to services (transportation, health services (including mental health services), outreach, information and assistance (which may include information and assistance to consumers on availability of services under part B and how to receive benefits under and participate in publicly supported programs for which the consumer may be eligible), and case management services);

(B) in-home services, including supportive services for families of older individuals who are victims of Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and

(C) legal assistance;

and assurances that the Area Agency on Aging will report annually to the State agency in detail the amount of funds expended for each such category during the fiscal year most recently concluded.

(3)(A) designate, where feasible, a focal point for comprehensive service delivery in each community, giving special consideration to designating multipurpose senior centers (including multipurpose senior centers operated by organizations referred to in paragraph (6) (C)) as such focal point; and (B) specify, in grants, contracts, and agreements implementing the plan, the identity of each focal point so designated;

(4)(A)(i)(I) provide assurances that the Area Agency on Aging will—

(aa) set specific objectives, consistent with State policy, for providing services to older individuals with greatest economic need, older individuals with greatest social need, and older individuals at risk for institutional placement;

(bb) include specific objectives for providing services to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas; and

(II) include proposed methods to achieve the objectives described in items (aa) and (bb) of subclause (I);

(ii) provide assurances that the Area Agency on Aging will include in each agreement made with a provider of any service under this title, a requirement that such provider will—

(I) specify how the provider intends to satisfy the service needs of low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in the area served by the provider;

(II) to the maximum extent feasible, provide services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; and

(III) meet specific objectives established by the Area Agency on Aging, for providing services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area; and

(4)(A)(iii) With respect to the fiscal year preceding the fiscal year for which such plan is prepared, each Area Agency on Aging shall--

(I) identify the number of low-income minority older individuals and older individuals residing in rural areas in the planning and service area;

The applicant certifies compliance with the following regulations:

(II) describe the methods used to satisfy the service needs of such minority older individuals; and

(III) provide information on the extent to which the Area Agency on Aging met the objectives described in clause (a)(4)(A)(i).

(4)(B)(i) Each Area Agency on Aging shall provide assurances that the Area Agency on Aging will use outreach efforts that will identify individuals eligible for assistance under this Act, with special emphasis on--

(I) older individuals residing in rural areas;

(II) older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);

(III) older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas);

(IV) older individuals with severe disabilities;

(V) older individuals with limited English proficiency;

(VI) older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and

(VII) older individuals at risk for institutional placement, specifically including survivors of the Holocaust; and

(4)(C) Each area agency on agency shall provide assurance that the Area Agency on Aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas.

(5) Each Area Agency on Aging shall provide assurances that the Area Agency on Aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement, with agencies that develop or provide services for individuals with disabilities.

(6)(F) Each area agency will:

in coordination with the State agency and with the State agency responsible for mental health services, increase public awareness of mental health disorders, remove barriers to diagnosis and treatment, and coordinate mental health services (including mental health screenings) provided with funds expended by the Area Agency on Aging with mental health services provided by community health centers and by other public agencies and nonprofit private organizations;

(6)(G) if there is a significant population of older individuals who are Indians in the planning and service area of the area agency on aging, the area agency on aging shall conduct outreach activities to identify such individuals in such area and shall inform such individuals of the availability of assistance under this Act;

(6)(H) in coordination with the State agency and with the State agency responsible for elder abuse prevention services, increase public awareness of elder abuse, neglect, and exploitation, and remove barriers to education, prevention, investigation, and treatment of elder abuse, neglect, and exploitation, as appropriate; and

The applicant certifies compliance with the following regulations:

- (9)(A) the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 307(a)(9), will expend not less than the total amount of funds appropriated under this Act and expended by the agency in fiscal year 2019 in carrying out such a program under this title; and (Ombudsman programs and services are provided by the Board on Aging and Long Term Care)
- (10) provide a grievance procedure for older individuals who are dissatisfied with or denied services under this title;
- (11) provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as "older Native Americans"), including-
- (A) information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, an assurance that the Area Agency on Aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under this title;
- (B) an assurance that the Area Agency on Aging will, to the maximum extent practicable, coordinate the services the agency provides under this title with services provided under title VI; and
- (C) an assurance that the Area Agency on Aging will make services under the area plan available, to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans.
- (13) provide assurances that the Area Agency on Aging will
- (A) maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships.
- (B) disclose to the Assistant Secretary and the State agency-
- (i) the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals; and
- (ii) the nature of such contract or such relationship.
- (C) demonstrate that a loss or diminution in the quantity or quality of the services provided, or to be provided, under this title by such agency has not resulted and will not result from such non-governmental contracts or such commercial relationships.
- (D) demonstrate that the quantity or quality of the services to be provided under this title by such agency will be enhanced as a result of such non-governmental contracts or commercial relationships.
- (E) on the request of the Assistant Secretary or the State, for the purpose of monitoring compliance with this Act (including conducting an audit), disclose all sources and expenditures of funds such agency receives or expends to provide services to older individuals.

The applicant certifies compliance with the following regulations:

(14) provide assurances that funds received under this title will not be used to pay any part of a cost (including an administrative cost) incurred by the Area Agency on Aging to carry out a contract or commercial relationship that is not carried out to implement this title.

(15) provide assurances that funds received under this title will be used-

(A) to provide benefits and services to older individuals, giving priority to older individuals identified in paragraph (4)(A)(i); and
(B) in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;

(16) provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care;

(17) include information detailing how the area agency on aging will coordinate activities, and develop long-range emergency preparedness plans, with local and State emergency response agencies, relief organizations, local and State governments, and any other institutions that have responsibility for disaster relief service delivery;

Wisconsin Elders Act

If the applicant is an aging unit, the aging unit must comply with the provisions of the Wisconsin Elders Act.

Wisconsin Statutes Chapter 46.82 Aging unit.

“Aging unit” means an aging unit director and necessary personnel, directed by a county or tribal commission on aging and organized as one of the following:

- (1) An agency of county or tribal government with the primary purpose of administering programs of services for older individuals of the county or tribe.
- (2) A unit, within a county department under s. 46.215, 46.22
- (3) or 46.23, with the primary purpose of administering programs of
- (4) services for older individuals of the county.
- (5) A private corporation that is organized under ch. 181 and
- (6) that is a nonprofit corporation, as defined in s. 181.0103 (17).

Aging Unit; Creation. A county board of supervisors of a county, the county boards of supervisors of 2 or more contiguous counties or an elected tribal governing body of a federally recognized American Indian tribe or band in this state may choose to administer, at the county or tribal level, programs for older individuals that are funded under 42 USC 3001 to 3057n, 42 USC 5001 and 42 USC 5011 (b). If this is done, the county board or boards of supervisors or tribal governing body shall establish by resolution a county or tribal aging unit to provide the services required under this section. If a county board of supervisors or a tribal governing body chooses, or the county boards of supervisors of 2 or more contiguous counties choose, not to administer the programs for older individuals, the department shall direct the Area Agency on Aging that serves the relevant area to contract with a private, nonprofit corporation to provide for the county, tribe or counties the services required under this section.

The applicant certifies compliance with the following regulations:

Aging Unit; Powers and Duties. In accordance with state statutes, rules promulgated by the department and relevant provisions of 42 USC 3001 to 3057n and as directed by the county or tribal commission on aging, an aging unit:

(a) Duties. Shall do all of the following:

1. Work to ensure that all older individuals, regardless of income, have access to information, services and opportunities available through the county or tribal aging unit and have the opportunity to contribute to the cost of services and that the services and resources of the county or tribal aging unit are designed to reach those in greatest social and economic need.
2. Plan for, receive and administer federal, state and county, city, town or village funds allocated under the state and area plan on aging to the county or tribal aging unit and any gifts, grants or payments received by the county or tribal aging unit, for the purposes for which allocated or made.
3. Provide a visible and accessible point of contact for individuals to obtain accurate and comprehensive information about public and private resources available in the community which can meet the needs of older individuals.
4. As specified under s. 46.81, provide older individuals with services of benefit specialists or appropriate referrals for assistance.
5. Organize and administer congregate programs, which shall include a nutrition program and may include one or more senior centers or adult day care or respite care programs, that enable older individuals and their families to secure a variety of services,

including nutrition, daytime care, educational or volunteer opportunities, job skills preparation and information on health promotion, consumer affairs and civic participation.

6. Work to secure a countywide or tribal transportation system that makes community programs and opportunities accessible to, and meets the basic needs of, older individuals.

7. Work to ensure that programs and services for older individuals are available to homebound, disabled and non-English speaking persons, and to racial, ethnic and religious minorities.

8. Identify and publicize gaps in services needed by older individuals and provide leadership in developing services and programs, including recruitment and training of volunteers, that address those needs.

9. Work cooperatively with other organizations to enable their services to function effectively for older individuals.

10. Actively incorporate and promote the participation of older individuals in the preparation of a county or tribal comprehensive plan for aging resources that identifies needs, goals, activities and county or tribal resources for older individuals.

11. Provide information to the public about the aging experience and about resources for and within the aging population.

12. Assist in representing needs, views and concerns of older individuals in local decision making and assist older individuals in expressing their views to elected officials and providers of services.

13. If designated under s. 46.27 (3) (b) 6., administer the long-term support community options program.

14. If the department is so requested by the county board of supervisors, administer the pilot projects for home and community-based long-term support services under s. 46.271.

The applicant certifies compliance with the following regulations:

15. If designated under s. 46.90 (2), administer the elder abuse reporting system under s. 46.90.

16. If designated under s. 46.87 (3) (c), administer the Alzheimer's disease family and caregiver support program under s.46.87.

17. If designated by the county or in accordance with a contract with the department, operate the specialized transportation assistance program for a county under s. 85.21.

18. Advocate on behalf of older individuals to assist in enabling them to meet their basic needs.

19. If an aging unit under sub. (1) (a) 1. or 2. and if authorized under s. 46.283 (1) (a) 1., apply to the department to operate a resource center under s. 46.283 and, if the department contracts with the county under s. 46.283 (2), operate the resource center.

20. If an aging unit under sub. (1) (a) 1. or 2. and if authorized under s. 46.284 (1) (a) 1., apply to the department to operate a care management organization under s. 46.284 and, if the department contracts with the county under s. 46.284 (2), operate the care management organization and, if appropriate, place funds in a risk reserve.

(b) Powers. May perform any other general functions necessary to administer services for older individuals.

(4) Commission on Aging.

(a) Appointment.

1. Except as provided under subd. 2., the county board of supervisors in a county that has established a single-county aging unit, the county

boards of supervisors in counties that have established a multicounty aging unit or the elected tribal governing body of a federally recognized American Indian tribe or band that has established a tribal aging unit shall, before qualification under this section, appoint a governing and policy-making body to be known as the commission on aging.

2. In any county that has a county executive or county administrator and that has established a single-county aging unit, the county executive or county administrator shall appoint, subject to confirmation by the county board of supervisors, the commission on aging. A member of a commission on aging appointed under this subdivision may be removed by the county executive or county administrator for cause.

(b) Composition.

A commission on aging, appointed under par. (a) shall be one of the following:

1. For an aging unit that is described in sub. (1) (a) 1. or 2., organized as a committee of the county board of supervisors, composed of supervisors and, beginning January 1, 1993, advised by an advisory committee, appointed by the county board. Older individuals shall constitute at least 50% of the membership of the advisory committee and individuals who are elected to any office may not constitute 50% or more of the membership of the advisory committee.

2. For an aging unit that is described in sub. (1) (a) 1. or 2., composed of individuals of recognized ability and demonstrated interest in services for older individuals. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.

The applicant certifies compliance with the following regulations:

3. For an aging unit that is described in sub. (1) (a) 3., the board of directors of the private, nonprofit corporation. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.

(c) Terms.

Members of a county or tribal commission on aging shall serve for terms of 3 years, so arranged that, as nearly as practicable, the terms of one-third of the members shall expire each year, and no member may serve more than 2 consecutive 3-year terms. Vacancies shall be filled in the same manner as the original appointments. A county or tribal commission on aging member appointed under par. (a) 1. may be removed from office for cause by a two-thirds vote of each county board of supervisors or tribal governing body participating in the appointment, on due notice in writing and hearing of the charges against the member.

(c) Powers and duties.

A county or tribal commission on aging appointed under sub. (4) (a) shall, in addition to any other powers or duties established by state law, plan and develop administrative and program policies, in accordance with state law and within limits established by the department of health and family services, if any, for programs in the county or for the tribe or band that are funded by the federal or state government for administration by the aging unit.

Policy decisions not reserved by statute for the department of health and family services may be delegated by the secretary to the county or tribal commission on aging. The county or tribal commission on aging shall direct the aging unit with respect to the powers and duties of the aging unit under sub. (3).

(5) Aging Unit Director; Appointment. A full-time aging unit director shall be appointed on the basis of recognized and demonstrated interest in and knowledge of problems of older individuals, with due regard to training, experience, executive and administrative ability and general qualification and fitness for the performance of his or her duties, by one of the following:

(a) 1. For an aging unit that is described in sub. (1) (a) 1., except as provided in subd. 2., a county or tribal commission on aging shall make the appointment, subject to the approval of and to the personnel policies and procedures established by each county board of supervisors or the tribal governing body that participated in the appointment of the county or tribal commission on aging. 2. In any county that has a county executive or county administrator and that has established a single-county aging unit, the county executive or county administrator shall make the appointment, subject to the approval of and to the personnel policies and procedures established by each county board of supervisors that participated in the appointment of the county commission on aging.

(b) For an aging unit that is described in sub. (1) (a) 2., the director of the county department under s. 46.215, 46.22 or 46.23 of which the aging unit is a part shall make the appointment, subject to the personnel policies and procedures established by the county board of supervisors.

(d) For an aging unit that is described in sub. (1) (a) 3., the commission on aging under sub. (4) (b) 3. shall make the appointment, subject to ch. 181.

APPENDICES

**AGING & DISABILITY RESOURCE CENTER
REVENUE AND EXPENDITURE SUMMARIZATION
JUNE 2024**

Income **\$60,400.98**

- Income includes ADRC Regional reimbursement, GWAAR reimbursement, driver escort co-payments, reimbursement from Veterans Service Office and Family Care Organizations for driver escort rides, bus contributions, city taxi payments, and rural taxi payments.
 - This also includes SUN revenues that are not directly the ADRC's but are needed for grant claiming.

Expenditures **\$106,095.33**

- Expenses include payroll and fringes, office supplies, postage, City of Dodgeville Taxi expenses, Rural Taxi expenses, ADRC Care-A-Van Bus expenses, volunteer driver reimbursement, supportive home care expenses, prevention program expenses, News & Views publication expenses, SUN expenses, and caregiver respite.
 - This also includes SUN expenses that are not directly the ADRC's but are needed for grant claiming.

**AGING & DISABILITY RESOURCE CENTER
REVENUE AND EXPENDITURE SUMMARIZATION
JULY 2024**

Income **\$95,225.58**

- Income includes ADRC Regional reimbursement, GWAAR reimbursement, Senior Expo vendor fees, driver escort co-payments, reimbursement from Veterans Service Office and Family Care Organizations for driver escort rides, bus contributions, city taxi payments, and rural taxi payments.
 - This also includes SUN revenues that are not directly the ADRC's but are needed for grant claiming.

Expenditures **\$184,648.92**

- Expenses include payroll and fringes, office supplies, postage, City of Dodgeville Taxi expenses, Rural Taxi expenses, ADRC Care-A-Van Bus expenses, volunteer driver reimbursement, supportive home care expenses, prevention program expenses, News & Views publication expenses, SUN expenses, the new transit van, Senior Expo, outreach, and caregiver respite.
 - This also includes SUN expenses that are not directly the ADRC's but are needed for grant claiming.

Disability Benefit Specialist: Michelle Leffler Elder Benefit Specialist: Renae Kratcha July 2024 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.

Client - A client is defined as a person who had one or more contacts to a case during the reporting period.

Case - A case is defined as an issues that the Ben Sec 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 issues includes an outcome. 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 : 55

Elder Benefit Specialist open cases : 25

Client Characteristics - The report looks at the demographic characteristics for clients who had one or more contacts related to a case during the reporting period.

18-59 : 25

60-99 : 45

Information calls - Benefit specialists receive many calls from consumers asking simple quick questions. An example of one of these calls would be if a consumer wanted to know what Social Security office to contact.

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 : \$1,005.00

Elder Benefit Specialist : \$196,392.00

Community Outreach and Events:

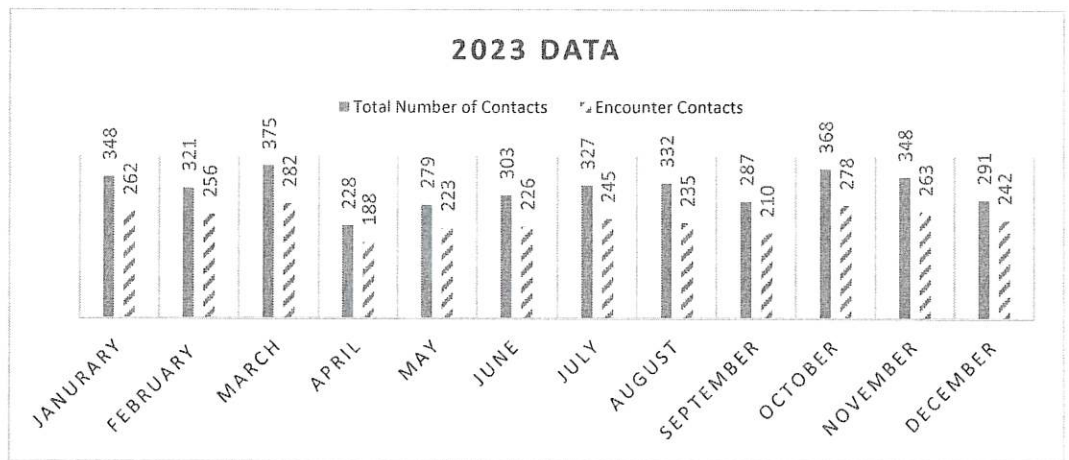
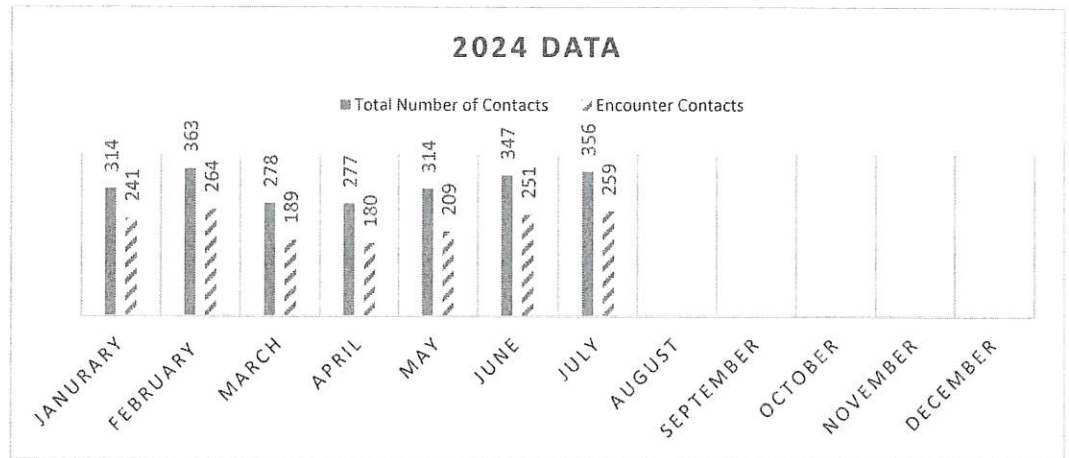
Date	Topic	Location
7/16/24	Medicare 101	Upland Hill Health

ADRC Specialists Report

JULY 2024 Data

Total Contacts
reflect the number of calls, walk-ins, scheduled office appointments or home visits with people requesting information. This information can include private pay resource information, Medicaid basics, application for Medicaid, Food Share, requests for in-home care information, etc.

Encounter Contacts
Includes only direct contact with consumer's and excludes administrative tasks associated with the contacts.



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Walk- Ins	18	6	11	11	18	40	23					
Scheduled Phone/Virtual/ Office Visits	10	13	5	3	4	4	5					
Home Visits	6	13	12	10	9	12	8					
Nursing Home Referrals	0	2	3	3	3	2	1					
Functional Screens Administered*	4	4	5	5	4	2	6					
Family Care Enrollments*	0	3	4	3	3	2	4					
IRIS Referrals*	2	1	2	3	0	1	0					

Staff participated in the following events:

Activities:

Trainings: Enrollment, Residency and Networking all day training in Baraboo; Dementia Care services; LTCFS refresher; Hmong Culture Training; Mind and Memory Training; Medicaid Training; MCO, ICA, and FEA trainings; Wishin Pulse Training; DVR presentation; Guardianship and Power of Attorney trainings.

Meetings: Expo Planning; Bi-weekly Economic Support meeting.

Outreach Events: Senior Farmers Market vouchers community sites x2; Hodan Community Services site visit.

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

-----*Descriptions*-----

Functional Screens Administered: 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.

Family Care Enrollments: 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.

IRIS Referrals: 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.

TRANSPORTATION COORDINATOR'S REPORT

July 2024

Submitted by Nohe Caygill

DRIVER ESCORT SERVICES

Current Month	2023	YTD	2024	YTD
Total Units of Service Provided:	113	957	208	996
Current Month	2023	YTD	2024	YTD
Driver Escort Fees Deposited:	\$125.00	7,325	\$1,461.92	8,195

ADRC TAXI SERVICES

Current Month	2023	YTD	2024	YTD
Total Units of Service Provided:	298	2,168	283	1,797
Current Month	2023	YTD	2024	YTD
ADRC Taxi Fees Deposited:	\$37.50	3,025.48	\$494.94	2,936.41

RURAL TAXI SERVICES

Current Month	2023	YTD	2024	YTD
Total Units of Service Provided:	75	562	94	503
Current Month	2023	YTD	2024	YTD
ADRC Taxi Fees Deposited:	\$126.50	2,223.55	\$334.50	2,223.25

ADRC CARE A VAN SERVICES

Current Month	2023	YTD	2024	YTD
Total Units of Service Provided:	0	266	23	71
Current Month	2023	YTD	2024	YTD
Donations Collected:	\$0.00	\$0.00	\$20.00	\$100.00
Current Month	2023	YTD	2024	YTD
Total Days Cancelled:	0	26	0	1



ADRC Advisory Board Meeting

August 2024

ADRC Manager's Report

In your packet, you received a copy of the DRAFT Iowa County Aging Plan. I am looking to pass this onto the Health and Human Services Committee meeting for their review. A Public Hearing is set for Wednesday, September 25, 2024 at the Health and Human Services Building, Conference Room 1001 at 1:00p.m. The Final Iowa County Aging Plan will be brought back to the October ADRC Board Meeting.

The ADRC and Aging Unit are receiving new databases this year. Each one has their own reporting requirements. Training and implementation will be taking place for the rest of 2024.

The ADRC still has Senior Farmers Market Vouchers available. They need to be distributed by 9/30/24 and they need to be redeemed by 10/31/24. 7/30/24: The ADRC hosted presentation for adults with disabilities, called "How Can DVR Help You Plan for Your Job Goals." A small group attended and a nice informational session and discussion took place.

8/7/24-9/18/24: The ADRC Dementia Care Specialists have started a Boost Your Brain and Memory at the Platteville Senior Center from 9:30-11:30am.

8/11/24: Some ADRC staff participated in the Cobb Corn Boil parade. Staff handed out some information about volunteering for the ADRC programs, like Driver Escort.

ADRC Events:

8/21/24: The ADRC will host a Medicare 101 at the Barneveld Library at 10:30am. This is for people who are new to Medicare.

9/9/24-10/21/24: The ADRC is hosting Walk with Ease, self-directed. This means you can participate from your own home, via phone or online. You are given the tools to work through the program and have weekly consultation with the Green County Wellness Coordinator. This program is proven to reduce chronic pain.

9/13/24: The ADRC and Upland Hills Health are hosting the Health and Wellness Expo from 9:00am to Noon at Hidden Valley Church. See the News and Views or our Website for more information. We will have signs in 4 locations throughout the county and a billboard in



Dodgeville. In addition, we will be advertising on WDMP, WGLR, and in the Chronicle, the Democrat Tribune and the Pecatonica Leader.

9/12-10/24: With presenters from Upland Hills Health Physical Therapy Department, the ADRC will host Stepping On at Arena Manor from 1:30-3:30pm. According to Wisconsin Institute for Healthy Aging, "Stepping On has been researched and proven to decrease falls by 31%. Fewer falls mean fewer injuries, fewer visits to the emergency room, fewer hospitalizations, and fewer deaths due to a fall." <https://wihealthyaging.org/programs/falls-prevention-programs/stepping-on/>

9/17/24: The Dementia Care Specialists will host a Dementia 101 and Risk Reduction presentation at Barneveld Public Library at 4:00pm.

10/15/24: Medicare Part D Open Enrollment starts. Information will be mailed to past consumers, by early October.

11/7/24-12/5/24: A Mind Over Matter (MOM) Healthy Bowels Healthy Bladder class is scheduled to start November 7th at the Montfort Community Building. It will be held from 2:00pm to 4:30pm. The class is only 3 sessions. This program is researched and proven to reduce bladder and bowel leakage! Incontinence is an issue that many adults struggle with, which can leave them isolated in their own homes. [Mind Over Matter: Healthy Bowels, Healthy Bladder | WIHA \(wihealthyaging.org\)](https://wihealthyaging.org/) This class is being held in partnership with Grant and Green counties.

"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 choose Zoom or n-person.

Advocacy:

Information about the Disability Vote Coalition's August 20th Lunch and Learn called Elections are More than Voting was emailed out to the ADRC Board.

The ADRC is working on plans to provide Free Rides to the Polls in November. More information will be shared in the News and Views and on our website.

Respectfully submitted,

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

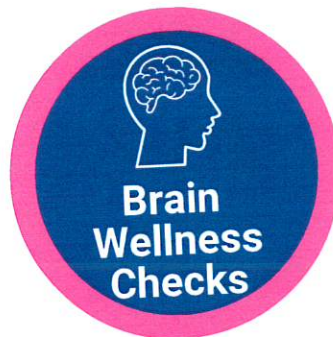
FREE Admission - FREE Door Prizes - FREE Health Screens



HEALTH & WELLNESS EXPO IOWA COUNTY

**Friday, September 13, 2024
9 AM - Noon**

**Hidden Valley Community Church
605 N. Bennett Rd. - Dodgeville, WI**



**Call the ADRC for questions and transportation options.
(608) 930-9835**

