



AGENDA
ADRC of Southwest Wisconsin-Iowa County Board
Tuesday, June 26, 2018 at 10:00 a.m.
Health & Human Service Center – Room 2001
303 W. Chapel St., Dodgeville, WI 53533 (608) 930-9835

**Iowa
County
Wisconsin**

1	Call to order.
2	Roll Call.
3	Approve the agenda for this June 26, 2018 meeting.
4	Approve the minutes of the May 22, 2018 meeting.
5	Report from committee members and an opportunity for members of the audience to address the committee. No action will be taken.
6	Review ADRC Monthly Transaction List. No action will be taken.
7	Department Reports: a) SUN: b) ADRC: (EBS, DBS, I&A, and Transportation)
8	ADRC Manager: a) Education about ADRC Services b) ADRC Managers Report c) Aging Plan 2019-2021 update d) Advocacy Updates
9	Set next meeting date: Tuesday, July 24, 2018 at the Health & Human Services Center, Community Room. 10:00 am
10	Adjournment.
	Posting verified by: <u>M. Oleson</u> Date: <u>6.21.18</u> Initials: <u>mbo</u>

Add ADRC-Aging Disability Resource Center



What is Advocacy?:

Advocacy represents the strategies devised, actions taken, and solutions proposed to influence decision-making at the local, state, and federal level to create positive change for people and their environment. Everyone needs to be involved, and a single voice is a powerful tool.

Different types of advocacy:

Individual Advocacy: Individual advocacy focuses on changing the situation of one person to protect his or her rights or to improve individual services.

(Brain Injury Research Center Website)

Systems Advocacy: Systems advocacy is an effort to change policies, rules or laws which determine how services are provided. Systems advocacy works to change the situations of a whole group of persons who share a similar problem, or to change a service system.

(Brain Injury Research Center Website)

Legislative Advocacy: The practice of attempting to persuade legislators to adopt a particular stance on an issue

How to Achieve the Highest Impact

Being a successful advocate requires more than the occasional phone call or letter. Remember that your legislators and policy makers are real people, so work to create a lasting relationship with them. Remember to send thank-you cards after visiting with you or after positive action is taken, or acknowledge their good work in some sort of public forum.

Never underestimate the power of a relationship or a personal story to influence!

ADVOCACY: The responsibility of the Aging Network

The Wisconsin Elders Act on advocacy:

Wisconsin Statutes 46.82 on **Aging Units**

(3) an aging unit:

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

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.

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

The Wisconsin ADRC 2017 Contract on advocacy:

III. SERVICES TO BE PROVIDED BY THE AGING AND DISABILITY RESOURCE CENTER

P. Customer and Systems Advocacy....

1. Informing People of Their Rights and Responsibilities
2. Helping People Resolve Disputes and Referring Them to Advocates
3. Cooperation with Client Advocates
4. ADRC Advocacy –

Aging and Disability Resource Centers shall advocate on behalf of the individuals and groups who comprise their target populations when needed services are not being adequately provided within the service delivery system.

The Older Americans Act on advocacy:

Sec 306

(6) provide that **the area agency on aging will**

(B) **serve as the advocate** and focal point **for older individuals within the community by** (in cooperation with agencies, organizations, and individuals participating in activities under the plan) monitoring, evaluating, and **commenting upon all policies, programs, hearings, levies, and community actions which will affect older individuals;**

What we can do!

- Teach people how to be advocates – teach them the legislative process and encourage them to express their thoughts and feeling with legislators and policy makers.
- Meet with your legislators to discuss an issue that is important to you as an individual, and is important to your consumer, the older adult. Get in the habit of calling or emailing them, or sending them letters.
- Provide legislators and policy makers with educational materials about a specific piece of legislation and provide them with routine informational mailings about your programs and services.
- Respond to a request from a legislative committee for information about a specific piece of legislation.
- Track activities of legislators, including votes, positions taken, contributions accepted, etc.
- Talk to the media.
- Advocate for better enforcement of existing laws.
- Conduct public education campaigns.
- Produce and disseminate research reports or studies that provide nonpartisan analysis on policy issues, including specific legislative issues.
- A newsletter to your own members providing info about a specific piece of legislation (e.g., a request to call or write to legislators).



Avenues for Advocacy

- Contact an elected official (face to face visit, phone call, email, letter).
- Hold a press conference.
- Host a rally.
- Provide testimony at public hearings.
- Hold an "awareness" event.

Contacting elected officials

- Visit face-to-face
- Call
- Email
- Write
- Invite them to do a site visit at your organization/program (officials currently in office)
- Engage on social media

Defining your message

- Key questions:
 - What is the problem?
 - What specifically do you want to have happen/change?
 - Who decides?
 - How will you persuade them?

Refining your message

- Who is your target audience?
- What do you know about them?
- What do they know about you?
- What do they know about your issue?

Making your case

- Know the facts: Use current data to discuss your issue.
- ***Tell stories: Stories are powerful and persuasive!***
- Use positive language: Give people something to be FOR, not against.
- Be mindful of timing: Pay attention to current news events, lawmakers' schedules, etc.

Use Research to Support Your Issue

- Site the source. Example: ¹ Council of Scientific Affairs, American Medical Association. Confidential health services for adolescents. JAMA. 1993;269:1420-1424.

Activity Strategy

- Take your piece of legislation that relates to one that is near and dear to your heart.
- Create an advocacy strategy to address your issue.
- Share with the larger group.

Grassroots Organizing Key Components

- Involving community members—e.g., professionals, participants, caregivers or those affected by the issue.
- Getting the message to those who can affect change—policy makers, media,
- Motivating others to have a self-interest in the issue,



Getting Started

- What issue or topic would benefit from a coordinated effort of support and advocacy?
- What is currently going on in your state, county, city, and/or community around this issue?
- What other organizations, groups or individuals support your position on this issue?
- What organizations, groups or individuals oppose your position on this issue?

Is there an existing coalition that supports this issue? Have you or another organization tried to form a coalition around this issue?

- What are the challenges or barriers to forming a coalition?
- What is your organizations' capacity (staff, resources, funding etc.) to coordinate a coalition?
- What national organizations can provide technical assistance and resources?

LOBBYING VS. ADVOCACY

Although most people use the words interchangeably, there is a distinction between advocacy and lobbying that is helpful to understand. Advocacy is the act of mobilizing individuals to spark changes in programs and policies at the local, state, and national levels. Lobbying refers specifically to advocacy efforts that attempt to influence legislation. (*PTA Website*)

Wisconsin's REGULATION OF LOBBYING

Subchapter III, Chapter 13, Wisconsin Statutes*

(6) INDIVIDUAL RIGHT TO LOBBY. Nothing in ss. 13.61 to 13.695 may be applied to or interfere with the right of any individual to engage in lobbying:

(a) Solely on his or her own behalf; **OR**

(b) By communicating solely with a legislator who represents the senate or assembly district in which the individual resides, whether or not such communication is made on behalf of the individual or on behalf of another person

From the Wisconsin Ethics Commission:

You have an obligation to obtain a lobbying license from the Wisconsin Ethics Commission, and the organization that pays you is required to authorize you as its lobbyist, if you attempt to influence state legislation or an administrative rule on behalf of a business or organization that employs you or from which you receive a payment (other than reimbursement of expenses) and you communicate with a state official or legislative employee about such matters on 5 or more days within a six month reporting period.

- If you are not acting on behalf of anyone other than yourself, you need not be licensed or authorized.
- If you represent the views of a business or organization but do so as an unpaid volunteer, you need not be licensed or authorized.
- **If you represent the views of a business or organization that pays you, but convey those views only to legislators elected from the Senate and Assembly districts in which you reside, you need not be licensed or authorized.**
- If you represent the views of a business or organization that pays you and you convey those views to all or many legislators or officials but do so only occasionally, up to 4 days within a 6-month period, you need not be licensed or authorized.

Otherwise, you should be licensed as a lobbyist, your employer should be registered as a lobbying organization with the Wisconsin Ethics Commission, and your employer should authorize you as its lobbyist and file that authorization with the Ethics Commission. Forms are available from the Ethics Commission.

<https://ethics.wi.gov/Resources/1511-LicenseToLobby.pdf>

ADRC Manager's Report: June 2018 ADRC Board Meeting

- Transportation Public Hearing - 5/1/18
- ADRC Monthly Staff Meeting (speaker: Sienna Crest) - 5/1/18
- Outreach at Unified Community Services Staff Meeting - 5/2/18
- Meeting with Income Maintenance to discuss best practice - 5/4/18
- ADRC Lunch and Learn/Public Forum (Linden Dining Site) - 5/7/18
- ADRC Breakfast and Learn/Public Forum (Highland Dining Site) - 5/8/18
- ADRC Lunch and Learn/Public Forum (Dodgeville Dining Site) - 5/8/18
- Senior Social in Lafayette County - 5/9/18
- Monthly Caregiver Program State-wide Call - 5/14/18
- Lunch and Learn/Public Forum (Arena Dining Site) - 5/15/18
- Aging Advocacy Day at the State Capital - 5/16/18
- Healthy Aging in Rural Towns Grant Meeting - 5/17/18
- Aging and Disability Professionals of Wisconsin Annual Meeting - 5/18/18
- ADRC Board Meeting - 5/22/18
- ADRC Regional Board Meeting/Manager's Meeting - 5/24/18
- Information and Assistance Bi-Monthly Meeting - 5/25/18
- Highland Clinic Outreach for Disability Benefit Specialist - 5/30/18
- Spring Green Clinic Outreach for Disability Benefit Specialist - 5/31/18
- Healthy Aging in Rural Towns Grant Meeting - 5/31/18

b.)

On a special note:

- * The May ADRC Lunch and Learns at the Iowa County Dining Sites were successful in gathering documentation for the Aging Plan. *Interesting*
- * Senior Farmers Market Vouchers started in June - will be doing six outreach events throughout the county to distribute. *over view who is eligible. Dianne drives ppl.*
- * June is Elder Abuse Awareness Month - there is Pinwheel Display in front of the Health and Human Services Center for the 1st half of the month and then in front of the Court House for the remainder of the month.

Reminder-mark your calendars-Health and Wellness Expo will be Friday 9/28/18.

- * Prevention: Tai Chi is happening right now at HHS Center - great reviews so far!

Walk with Ease will be starting at the Dodgeville Dining Site on 7/9/18. *full class!*

APS Workers and ADRC Manager to attend State APS Training on 7/19/18.

Alvina wants a program in Mineral Point!

Respectfully submitted by: Valerie Hiltbrand

C.) Aging Plan - before next Board mtg, must give GNAAAR draft plan. If GNAAAR says OK, bring back to Board to review. Rewrite in SMART Goal format. (ask her for the info) Cathy P. - ask Mark Klein to "job shadow" ppl at ADRC.

Bill L. - opioid use - good job - have a Dining Site on Meal Delivery w/ a Sheriff person - give up your old drugs & learn something plus get a meal.

Lori J. asked that we have a "card" for ppl. to put Rx on, Partner w/ doctors.

Bill L. - privatizing IRIS? Val explained both IRIS & Family Care. & then the companies OK for F.C. & IRIS.

Information & Assistance Report

For May 2018

Katie Batton, Sarah Blake, and Brittany Mainwaring

Total number of contacts: 221

This number reflects the number of 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: 3

Home visits: 21

Scheduled Office Visits: 17

Number of Functional Screens Administered: 12

determine eligibility interview takes 1 1/2-2 hours + then the paperwork, etc. another 6 hours

A functional screen consists of a series of questions about a person's 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 1 1/2 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 may 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: 3

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 three Managed Care Organizations, Inlusa, My Choice and Care Wisconsin, which provide the Family Care Program. Their staff in conjunction with the customer coordinate the services, which are offered by the Managed Care Organization. The Managed Care Organization purchases these services from their own network of providers. 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: 1

IRIS, (Include, Respect, I Self-Direct) is another program which also provides funding for services. In this area of the state, The Management Group (TMG) and Advocates4U administer the IRIS program. 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.

Additional meetings and other events:

Examples:

Information and Assistance Specialist's work as a part of *Regional function teams* to maintain quality assurance while serving the community. The Regional Aging and Disability Resource Center consists of Grant, Green, Iowa and Lafayette counties.

Information and Assistance Specialist's also work on transitioning students from the world of high school and child waiver programs to adult programs. This can be in the form of completing functional screens, options counseling, attending Individualized Educational Program (progress) meetings and the County Communities on Transition (CCOT) meetings.

Further education in the field of human services is also required, and is often fulfilled through attendance at state conferences and other trainings.

This month, staff participated in the following: Stand Up and Move More, REED (Recreational Educational Exploration Day), Upland Hills Knee Pain Presentation, CLA (Community Leadership Alliance), Engage at Any Age Outreach, ADRC of Southwest WI Regional Quality Improvement working group meetings.

Key:

CCoT- County Communities on Transition

DSS- Department Social Services

I&A- Information and Assistance Specialist

IEP- Individualized Education Program

IRIS- Include, Respect, I Self Direct

MCO- Managed Care Organization

MDS Q- Minimum Data Set

TUESDAY, MAY 22, 2018

State of
Wisconsin
County of
Iowa

**UNAPPROVED MINUTES OF THE ADRC OF SOUTHWEST WISCONSIN,
IOWA COUNTY BOARD MEETING HELD
TUESDAY, MAY 22, 2018 at 10:00 a.m.
HEALTH & HUMAN SERVICES CENTER
303 W. CHAPEL ST., CONF. ROOM 1001, DODGEVILLE, WI 53533**

2018-04

Item		Index
1)	Chairperson Lindholm called the meeting to order at 10:01 a.m.	Call to Order
2)	Roll Call – Members Present: Linda Wetzel Hurley, Judy Lindholm, Jeremy Meek, Lynn Munz, Justin O'Brien, Cathy Palzkill, Trish Rock, Alvina Sturz, and Bryan Walton. Others Present: Valerie Hiltbrand, Marylee Oleson, Jamie Gould, Paula Daentl. Excused: Dianne Evans, Lori Fisher, Nancy Gaffney and Marlene Stenner.	Roll Call
3)	Chairperson Lindholm called for nominations for Election of Vice-Chairperson. Supervisor Jeremy Meek nominated Patricia "Trish" Rock. No other nominations. Nominations closed. Motion made by Jeremy Meek, seconded by Alvina Sturz to approve Trish Rock for Vice-Chairperson. Motion carried	Elect Vice-Chairperson
4)	Approval of the May 22, 2018 Agenda. Motion by Cathy Palzkill and seconded by Lynn Munz to accept the agenda of the May 22, 2018 meeting. Motion carried.	Agenda Approval
5)	Approval of the April 24, 2018 meeting minutes. Motion made Alvina Sturz and seconded by Linda Wetzel Hurley to accept the meeting minutes of the April 24, 2018 meeting. Motion carried.	Meeting Minutes Approval
6)	Valerie Hiltbrand informed the board that Marlene Stenner's final meeting was today. Marlene was unable to attend. Marlene served two terms on the ADRC Board. She is a retired Economic Support Service employee from the Dept. of Social Services. The Board thanked Marlene for her dedication and service and wanted to make sure she was recognized for her commitment to the elderly and disabled in our community. Chairperson Lindholm agreed and said her leadership is appreciated as both a former employee and a Board member. Chairperson Lindholm complimented the volunteer banquet and those who were able to attend agreed.	Comments from the Committee
7)	Chairperson Lindholm noticed that Income and Expenses are nearly the same. She also commented that money spent for Caregiver Respite is a wonderful thing.	Review Monthly Transaction List
8)	Jamie Gould, Finance Manager, presented. She directed everyone to the last page which has definitions for In-Kind and Indirect Costs. 2018 Finances look good. The ADRC has collected 55% of their yearly revenue. The percentage collected is high due to the ADRC receiving 100% of their tax levy at the beginning of the year. In relation to the adopted budget, expenditures total 23% in the 1 st Quarter.	1 st Quarter ADRC Financials
9)	Motion to go into Closed Session to consider two new ADRC Board members. Motion made by Alvina Sturz and seconded by Jeremy Meek to go into Closed Session. Motion carried.	Motion to go into Closed Session
10)	Motion to return to Open Session made by Cathy Palzkill and seconded by Linda Wetzel Hurley. Motion carried.	Motion to return to Open Session
11)	Motion to approve John "Pat" Reilly and William "Bill" Ladewig as new ADRC Board members made by Cathy Palzkill and seconded by Alvina Sturz. Motion carried. Recommendation will be forwarded to the County Board.	Action on Closed Session Item
12)	Review Department Reports: a) SUN : Cecile McManus, SUN Director for Iowa and Lafayette Counties, was absent. The Highland Dining Site will serve Avoca meals and drivers from Avoca and Highland will be delivering the meals.	Review Department

	b) <u>I&A</u>: Report provided. c) <u>EBS</u>: Report provided. d) <u>DBS</u>: Report provided. Chairperson Lindholm noted it was a slow month for the DBS program. Valerie Hiltbrand responded that Nikki Brennum is reaching out to local clinics and providing information on her services. e) <u>ADRC Transportation</u>: Report provided. Paula Daentl presented. The driver escort program had three new customers just last week. April driver escort services were down by 33% and YTD is down 16%. Care A Van services were flat for April and just slightly over YTD (3%). Four Care A Van days were cancelled in April due to weather! Passenger Assistance Techniques (PAT) Training and Defensive Driving for Volunteer Drivers will be held Tuesday and Wednesday, May 22 & 23. The Volunteer Banquet was held on Tuesday, April 24 at The Walker House in Mineral Point. It was well attended and the guests enjoyed themselves. Almost 25 people attended the Public Meeting on Transportation on Tuesday, May 1. There was a lot of feedback that was shared with Southwestern Wisconsin Regional Planning Commission for the 5 Year Coordinated Transportation Plan. Board members had a few questions about the driver escort program that Paula was happy to answer.	Reports
13)	ADRC Manager's Report: Valerie Hiltbrand presented. a) <u>Report Provided</u>: • Dementia Questions – thank you to Linda Wetzel-Hurley who was the keynote speaker and did a great job. The ADRC hopes to do it again next year. There will be a dementia film screening at the Mineral Point Opera House sometime in 2018. • APS (Adult Protective Services) Collaborative Meeting between the four counties in the region. They are reviewing best practices to streamline services. The state of Wisconsin is interested in what they are doing. • GWAAR (Greater Wisconsin Area Aging on Resources) meeting regarding the Aging Plan – more surveys are available for anyone who wants them. • Check out our Facebook page (ADRC of Southwest Wisconsin) and our website (https://adrcswwi.org/iowa) for information on ADRC Month. • Lunch and Learns at the Dining Sites were successful in gathering documentation for the Aging Plan. Great conversations and suggestions. • Knee Pain presentation being held today at 11 o'clock in the Community Room. • Another pinwheel display will go up outside the ADRC and the Courthouse highlighting Elder Abuse Awareness Month. • Caregiver Community Dialogue flyer was distributed. Information gathered will be given directly to state legislators. Respite is being offered to those who want to attend but need day services for their loved one. Chairperson Lindholm suggested a training on hospice, i.e. what questions to ask and best practices. Consumers need to know what to expect from hospice. • Distributed the Senior Care Waiver Proposal from the State of Wisconsin. b) <u>Aging Plan 2019-2021 Survey</u>: This survey may overlap the survey being conducted by HeART – Healthy Aging in Rural Towns, which is a grant that was awarded to the Public Health Department, in partnership with the ADRC and Upland Hills Health. The UW School of Medicine is assisting creating the survey. Valerie may use information obtained in the HeART survey in the Aging Plan Survey.	ADRC Manager

	c) <u>Advocacy Updates:</u> Aging Advocacy Day was Wednesday, May 16. Valerie Hiltbrand shared a slideshow. Valerie Hiltbrand, Stacey Terrill, Nancy Gaffney and Bruce Paull attended on behalf of our county. Valerie distributed handouts on the topics they covered for the day.	
14)	Tuesday, June 26, 2018 approved for the next ADRC Board meeting. It will be held at 10:00 a.m. in the Health & Human Services Center, Community Room.	Next Meeting Date
15)	Motion made by Alvina Sturz and seconded by Justin O'Brien to Adjourn. Motion carried. Meeting adjourned at 11:06 a.m.	Adjourn

**AGING & DISABILITY RESOURCE CENTER
MONTHLY TRANSACTION LIST**

May-18

	Item	Amount
	Woodward Community Media (News & Views)	\$1,599.50
	UWSP Continuing Education (Conference Fee)	\$150.00
	Caregiver Respite	\$115.00
	Driver Escort Reimbursement (10 Trips)	\$33.39
	Dodgeville Chronicle (Advertising)	\$222.00
	Driver Escort Reimbursement (8 Trips)	\$229.99
	Caregiver Respite	\$284.00
	Driver Escort Reimbursement (3 Trips)	\$202.20
	Driver Escort Reimbursement (1 Trip)	\$26.71
	Driver Escort Reimbursement (5 Trips)	\$197.84
	Caregiver Respite	\$75.00
	Glacier Canyon Lodge (Lodging for Training)	\$82.00
	Driver Escort Reimbursement (1 Trip)	\$3.50
	Caregiver Supplemental	\$60.00
	Driver Escort Reimbursement (2 Trips)	\$44.15
	Respite	\$279.95
	Driver Escort Reimbursement (2 Trips)	\$50.37
	Driver Escort Reimbursement (2 Trips)	\$81.21
	Driver Escort Reimbursement (6 Trips)	\$350.74
	Driver Escort Reimbursement (5 Trips)	\$142.25
	Driver Escort Reimbursement (10 Trips)	\$303.02
	Driver Escort Reimbursement (5 Trips)	\$130.72
	Driver Escort Reimbursement (10 Trips)	\$397.31
	Driver Escort Reimbursement (2 Trips)	\$27.75
	Petty Cash (Caregiver Support Group Supplies)	\$6.30
	Reserve Account (Postage)	\$171.71
	Caregiver Respite	\$80.00
	Caregiver Respite	\$52.50
	SW CAP (Driver Escort Training)	\$104.85
	Driver Escort Reimbursement (8 Trips)	\$386.22
	Caregiver Services	\$414.00
	Walmart (Office Supplies)	\$149.11
	ADRC Board Mileage Reimbursement	\$15.26
	May ADRC Salaries	\$44,638.38
	TOTAL EXPENSE	\$51,106.93

MONTHLY INCOME TRANSACTION LIST

May-18

DATE	Item	Amount
	Care A Van Donations	\$1,408.99
	Driver Escort Fees	\$689.60
	Family Care	\$279.66
	Veteran's Driver Escort Fees	\$913.54
	Stand Up Grant	\$840.00
	Greater Wisconsin Agency on Aging Resource (GWAAR)	\$0.00
	ADRC Regional - Green County	\$39,258.52
	TOTAL INCOME	\$43,390.31

Disability Benefit Specialist-Nikki Brennum
Summary Report Period: 05/01/2018-05/30/2018

	2017	2018
Total Cases Opened this Month	0	10
Client Ages		
18-20	0	0
21-29	0	0
30-39	0	4
40-49	0	1
50-59	0	4
Disability		
Deaf/Hard of Hearing	0	0
Developmental Disability	0	0
Physical Disability	0	4
Physical Disability/Mental Illness	0	2
Physical Disability/Developmental Disability	0	1
Mental Illness	0	2
Developmental Disability/Mental Illness	0	0

Number of Cases Closed for this Period	0	5
Application/Forms Completed	0	0
Approved at reconsideration	0	0
Approved at application	0	5
Client withdrew	0	0
Denied at application (Not Appeal)	0	0
Denied at reconsideration (Not Appeal)	0	0
Referral to Private Attorney (Non Pro Bono)	0	0
Client Transferred to another ADRC	0	0
<i>Monetary Impact of Cases Closed:</i>	<i>\$0</i>	<i>\$71,272</i>
Federal	\$0	\$62,243
State	\$0	\$9,029
Other	\$0	\$0
Year to date:	\$227,953	\$135,771

Monetary impact is defined as the value of benefits or services that are obtained or preserved for a client, as well as money that is saved or recovered for a client, with the help of a benefit specialist. Monetary impact is just one way to measure the positive impact of benefit specialists' services.

Monthly Activities:

- Completed an article for News and Views.
- Attended a Unified Community Service Staff meeting
- Attended a DBS Training

Elder Benefit Specialist Stacey Terrill May 2018 Report

CLIENTS AND CASES

Total Unduplicated Clients :	77	Carryover Cases :	51
New Clients :	24	Cases Opened :	84
		Cases Closed :	76
Total Hours Spent on Legal/Benefits Assistance :	68	Cases Remaining Open :	59

CLIENT CHARACTERISTICS

Age Group	Client Count	%
0-59	1	1.3 %
60-69	50	64.9 %
70-79	12	15.6 %
80-89	10	13.0 %
90-99	3	3.9 %
100+	0	0.0 %
Unknown	1	1.3 %

Rural Status

Is Rural	76	98.7 %
Is Not Rural	1	1.3 %
Unknown	0	0.0 %

Gender

Female	50	64.9 %
Male	27	35.1 %
Unknown	0	0.0 %

Lives Alone Status	Client Count	%
Lives Alone	32	41.6 %
Does Not Live Alone	43	55.8 %
Unknown	2	2.6 %

Race

American Indian/Native Alaskan	0	0.0 %
Asian	0	0.0 %
Black/African American	0	0.0 %
Native Hawaiian/Other Pacific Islander	0	0.0 %
Non-Minority (White, non-Hispanic)	70	90.9 %
White-Hispanic	0	0.0 %
Other	0	0.0 %
Missing/Unknown	7	9.1 %

Income Status

At or Below 100% of the FPL	15	19.5 %
Above 100% of the FPL	59	76.6 %
Unknown	3	3.9 %

MONETARY IMPACT

	Dollars	%
Federal Funds	\$ 137,034	93.6 %
State Funds	\$ 1,802	1.2 %
Other Funding Sources	\$ 7,605	5.2 %

GRAND TOTAL : \$ 146,441

2017 GRAND TOTAL: \$ 33,915

Community Outreach and Events:

Date	Topic	Location
05/15/2018	Navigating the Medicare Maze	HHS Building

Benefit Specialist Trainings:

Date	Topic
05/16/2018	Aging Advocacy Day

Additional Activities and Events:

Date	Topic
05/01/2018	Life Review Training- Agrace
05/10/2018	I-Team Meeting
05/25/2018	Expo Planning Meeting
05/30/2018	Dementia Live Iowa County Clerk of Courts

TRANSPORTATION COORDINATOR'S REPORT

May 2018

Submitted by Paula Daentl

DRIVER ESCORT SERVICES				
Current Month	2017	YTD	2018	YTD
Total Units of Service Provided:	234	1,047	179	859
Current Month	2017	YTD	2018	YTD
Driver Escort Fees Deposited:	\$801.00	\$5,786.30	\$1,882.80	\$7,283.36

CARE A VAN SERVICES				
Current Month	2017	YTD	2018	YTD
Total Units of Service Provided:	265	1,887	476	2,146
Current Month	2017	YTD	2018	YTD
Donations Collected:	\$1,433.84	\$2,563.27	\$1,408.99	\$3,955.76
Current Month	2017	YTD	2018	YTD
Total Days Cancelled:	1	8	1	17

Care A Van Summary

In May, the bus went to the following locations:

- Every Tuesday is Dodgeville day and Senior Dining Center
- Alternate Wednesdays going to Platteville and Richland Center
- Verona for lunch & shopping
- Shullsburg/Benton for lunch & thrift shopping
- Dubuque for lunch & shopping
- Sauk City / Black Earth for lunch & shopping
- Monroe for lunch & shopping
- Wisconsin Dells for lunch & shopping
- Dine-Out Days to Walker House in Mineral Point
- We averaged SIX people per trip.