

Marylee

|                                                                                   |                                                                                                                                                                                                                                                                            |                                                                         |
|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
|  | <p style="text-align: center;"><b>AGENDA</b><br/> <b>ADRC of Southwest Wisconsin-Iowa County Board</b><br/> <b>Tuesday, November 20, 2018 at 10:00 a.m.</b><br/> <b>Linden Dining Site, Linden Municipal Building,</b><br/> <b>444 Jefferson St., Linden, WI 53553</b></p> | <p style="text-align: center;"><b>Iowa<br/>County<br/>Wisconsin</b></p> |
| 1                                                                                 | Call to order.                                                                                                                                                                                                                                                             |                                                                         |
| 2                                                                                 | Roll Call.                                                                                                                                                                                                                                                                 |                                                                         |
| 3                                                                                 | Approve the agenda for this November 20, 2018 meeting.                                                                                                                                                                                                                     |                                                                         |
| 4                                                                                 | Approve the minutes of the October 23, 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 Financial Summary. No action will be taken.                                                                                                                                                                                                            |                                                                         |
| 7                                                                                 | Business Manager, Jamie Gould – Review 2018 3 <sup>rd</sup> Quarter Financials.                                                                                                                                                                                            |                                                                         |
| 8                                                                                 | Action Item: Approval of the <b>2019</b> 85.21 Grant Information Application Form.                                                                                                                                                                                         |                                                                         |
| 9                                                                                 | Motion to Approve the <b>2019</b> 85.21 Grant Information Application Form.                                                                                                                                                                                                |                                                                         |
| 10                                                                                | Department Reports:<br>a) SUN:<br>b) ADRC: (EBS, DBS, I&A, and Transportation)                                                                                                                                                                                             |                                                                         |
| 11                                                                                | ADRC Manager:<br>a) ADRC Managers Report<br>b) Advocacy Updates                                                                                                                                                                                                            |                                                                         |
| 12                                                                                | <b>Set next meeting date:</b> Tuesday, January 22, 2019 at Health & Human Services Center, 303 W. Chapel Street, Dodgeville, WI 53533. 10:00 am.                                                                                                                           |                                                                         |
| 13                                                                                | Adjournment.                                                                                                                                                                                                                                                               |                                                                         |
|                                                                                   | Posting verified by: M. Oleson      Date: 11.14.2018      Initials: mbo                                                                                                                                                                                                    |                                                                         |

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TUESDAY, OCTOBER 23, 2018

State of  
Wisconsin  
County of  
Iowa

**UNAPPROVED MINUTES OF THE ADRC OF SOUTHWEST WISCONSIN,  
IOWA COUNTY BOARD MEETING HELD  
TUESDAY, OCTOBER 23, 2018 at 10:00 am.  
HEALTH & HUMAN SERVICES CENTER  
303 W. CHAPEL ST., COMMUNITY ROOM, DODGEVILLE, WI 53533**

2018-09

| Item |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Index                             |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| 1)   | Vice-Chairperson Rock called the meeting to order at 10:04 am.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Call to Order                     |
| 2)   | Roll Call – Members Present: Kathy Elliott, Lori Fisher, Nancy Gaffney, Linda Wetzel Hurley, William Ladewig, Jeremy Meek, Lynn Munz, Justin O'Brien, J. Patrick Reilly, Trish Rock, and Bryan Walton. Excused: Dianne Evans, Chair Judy Lindholm, and Cathy Palzkill. Others Present: Jim Griffiths-County Board member, Cecile McManus, Nikki Brennum, Paula Daentl, Jamie Gould, Valerie Hiltbrand, and Marylee Oleson.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Roll Call                         |
| 3)   | Approval of the <b>October 23, 2018</b> Agenda. Motion by Ladewig and seconded by Reilly to accept the agenda. Motion carried.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Agenda Approval                   |
| 4)   | Approval of the <b>September 25, 2018</b> meeting minutes. Motion by Ladewig and seconded by Fisher to accept the meeting minutes. Motion carried.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Meeting Minutes Approval          |
| 5)   | There were no questions nor comments from the board.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Comments from the Committee       |
| 6)   | Report Provided. There were no questions or comments from the board.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Monthly Financial Summary         |
| 7)   | Jamie Gould, Finance Manager, presented the 2019 Applicant Information Form for the 85.21 Grant. Page 1 Goals were developed as part of the SW Wisconsin Locally Developed Coordinated Transit Plan. The new Rural Transit minivan was included as inventory because it will be part of our transportation in 2019. The Trust Fund Spending Plan was discussed and there are rules and regulations that must be followed. There is a scheduled Public Hearing on Tuesday, November 6 to present the form to the public. Questions arose concerning the use of the Care A Van buses, the geography of service, and how often they are used. It was requested Gould change Geography of Service to include other counties besides Iowa County. Gould explained we don't have to say where we drive, just for whom we drive (residents in Iowa County). Gould will include that we drive to other counties on the General Project Summary. Gould and Paula Daentl were on hand to answer questions. | 85.21 Grant Application Form      |
| 8)   | O'Brien recommended approving the 85.21 Grant Application Form with the recommended additions to the General Project Summary item, which were noted by Gould. Motion by Ladewig and seconded by Fisher to approve the amended form. Motion carried.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Approve 85.21 Grant               |
| 9)   | Hiltbrand directed everyone to page 4 of the Goals section. A new goal had been included at the suggestion of Ladewig to develop an online marketing strategy. The Aging Unit Plan Draft had gone to the HHS Committee with the new goal included and was approved. Hiltbrand had a Public Hearing on 10/11/18 and had one person attend who gave positive feedback.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 2019-2021 Aging Unit Plan         |
| 10)  | Motion by Ladewig and seconded by Sturz to approve the Aging Unit Plan. Motion carried.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Approve 2019-2021 Aging Unit Plan |

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                  |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| 11) | Motion by Sturz and seconded by Walton to go into Closed Session. Motion carried.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Motion to go into Closed Session |
| 12) | Motion by Sturz and seconded by O'Brien to return to Open Session. Motion carried.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Motion to Return to Open Session |
| 13) | Motion by Wetzel Hurley and seconded by Gaffney to approve two new Volunteer Driver Escorts (contingent on approved driving record for one driver). Fisher abstained. Motion carried. Paula Daentl will contact the new drivers Dawn Bauman and Dr. Michael Fisher.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Action on Closed Session Items   |
| 14) | <p>Review Department Reports:</p> <p><b>SUN (Seniors United for Nutrition):</b> Cecile McManus, SUN Director for Iowa and Lafayette Counties, presented. The \$13,760 budget increase SUN requested from Iowa County was restored, after it was previously removed from the original 2019 budget worksheet. The County Board will pass the 2019 budget next month. More meals are being served in Iowa County (55%) as compared to Lafayette County (45%). The increase is mainly due to more participants in Dodgeville. Beginning in early December their Annual Letter of Appeal will begin mailing. O'Brien is working on a new logo for SUN. They are also looking at new fundraising events. GWAAR has increased their allocation to SUN by \$9,000. Highland meals were prepared by Grandma's Kitchen and will now be prepared by Betsy's Restaurant. New owner is Naomi Michek. ADRC Aging Unit Plan includes goals for nutrition. One goal is to have a "Dine at 5" (evening meal) at one of the dining sites to introduce people to the SUN Program. This would be a Pilot Program in 2020 and limited to a few times a year. Fisher asked if Betsy's Restaurant would continue the breakfast program and they will according to McManus. Fisher also put in a request for more Dodgeville route drivers. Suggested to advertise for more drivers and talk to local businesses to see if employees had any interest to volunteer.</p> <p><b>I&amp;A (Information &amp; Assistance):</b> Report provided.</p> <p><b>EBS (Elder Benefit Specialist):</b> Report provided. Reminder that the ADRC does not sell insurance. We refer individuals to the Medigap Helpline Counselors who can help you evaluate your current policy and clarify many issues related to employer-sponsored coverage, managed care, Medicare Advantage, open enrollment, and Medicare Savings Programs. Call 1.800.242.1060.</p> <p><b>DBS (Disability Benefit Specialist):</b> Report provided. Nikki Brennum attended and explained her position. She pointed out that she didn't have any closed cases in September mainly due to the fact she was assisting Grant County as they have a new DBS who wasn't able to start meeting with clients until her training was complete. She is assisting with the "Let's Talk About Pain Medicines" presentation. It will be held on Monday, December 3 at 11:00 AM in the Community Room. Prescription Drug Disposal is available from 10:30-11:00 AM. Register at the ADRC by calling 930-9835. A Free Lunch follows the presentation.</p> <p><b>ADRC Transportation:</b> Report provided.</p> | Review Department Reports        |
| 15) | <p>ADRC Manager's Report: Valerie Hiltbrand presented.</p> <p>a) Report Provided:</p> <ul style="list-style-type: none"> <li>Health &amp; Wellness EXPO was a success. Participation from other agencies, volunteers, and at least 250 attendees. Sixty-eight people ate at the Dodgeville Dining Site and another 32 received home delivered meals. Ladewig asked if Hiltbrand followed-up with her team and yes, a meeting was held the next week to review the hits and misses. Upland Hills Health paid for four billboards throughout the county that advertised the EXPO. We advertised on our website and Facebook, Queen B Radio, D99.3 radio, and local</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | ADRC Manager                     |

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                   |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
|     | <p>newspapers as well as our newsletter. It was also advertised on the Dodgeville community electronic bulletin board and posters were distributed throughout the county. Upland Hills Health requested to collaborate with us again for next year.</p> <ul style="list-style-type: none"> <li>• Stepping On will wrap up on November 15.</li> <li>• Former Gov. Martin Schreiber presentation is scheduled for tomorrow, Wednesday, October 24 at Grace Lutheran Church, Dodgeville. Based on Facebook responses we are expecting over 50 people to attend.</li> <li>• Next week, Wednesday, October 31 there will be a free Memory Screen workshop as a follow-up to the Gov. Schreiber presentation. It will be at Grace Lutheran Church beginning at 10:00 AM. No appointment necessary</li> <li>• November is National Caregiver Month. Caregiver Renewal Day is scheduled for Friday, November 9 in Platteville. Mike Mitchell of Mineral Point will be the guest speaker. The ADRC can provide financial reimbursement for respite care.</li> </ul> <p><b>b) <u>Advocacy Updates:</u></b></p> <ul style="list-style-type: none"> <li>• Hiltbrand distributed colored maps displaying Wisconsin Senate and Congressional Districts as well as a list of names and addresses for state senators and congressional leaders.</li> <li>• The State of Wisconsin is holding a session at 10:00 AM in the Governor's Conference Room on Thursday, November 1 proclaiming November as Family Caregivers Month. They have asked caregivers to attend who will have an opportunity to share their stories.</li> <li>• GWAAR has requested family caregivers send in pictures and memes focusing on their journey as a family caregiver. Pictures and memes can be sent to <a href="mailto:wfacsa@gmail.com">wfacs@gmail.com</a>. The full story can be found in our November News and Views on page 2.</li> </ul> <p>Kathy Elliott asked if the "Boost Your Brain" workshop that was offered in Belmont would be offered in Iowa County. Hiltbrand said that is the plan; however, a location and date has not been decided yet. They do have a waiting list created for customers who would like to participate if Kathy was interested.</p> <p>Reminder – if you would like to eat at the Linden Dining Site after next month's meeting, please let Hiltbrand know. A meal must be reserved at least one day in advance.</p> |                   |
| 16) | <p><b>Tuesday, November 20, 2018</b> approved for the next ADRC Board meeting. Location will be the Linden Dining Site, Linden Municipal Building, 444 Jefferson Street, Linden, WI 53553, 10:00 am.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Next Meeting Date |
| 17) | <p>Motion by Sturz and seconded by Fisher to Adjourn. Motion carried. Meeting adjourned at 11:38 am.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Adjourn           |

**AGING & DISABILITY RESOURCE CENTER  
REVENUE AND EXPENDITURE SUMMARIZATION  
OCTOBER 2018**

**Income**                      **\$48,537.29**

- Income includes reimbursement from Regional ADRC, driver escort co-payments, bus donations, reimbursement from GWAAR, senior expo food stand sales, insurance proceeds and a donation to the News & Views publication.

**Expenditures**              **\$57,299.97**

- Expenses include payroll, staff training, advertising, postage, office supplies, volunteer driver reimbursement, caregiver respite, and bus maintenance.
  - The big bus needed four new tires and the driver's side rear fender was replaced on the little bus as someone back their car into it while the bus was on an outing. No one was hurt in the accident, but the plastic fender was destroyed.

## ACS FINANCIAL SYSTEM

11/12/2018 15:51:41

LEVEL OF DETAIL 1.0 THRU 4.0

Revenue Guideline

FOR THE PERIOD(S) JAN 01, 2018 THROUGH SEP 30, 2018

IOWA COUNTY WISCONSIN  
GL520R-V08.10 PAGE 1\*\*\* USER MAY NOT HAVE ACCESS \*\*\*  
\*\*\* TO ALL ACCOUNTS IN RANGE \*\*\*

| Adopted Budget | REVISED | ANNUAL ACT QTD POSTED ACT YTD POSTED<br>AND IN PROCESS AND IN PROCESS | REMAINING<br>BALANCE | PCT |
|----------------|---------|-----------------------------------------------------------------------|----------------------|-----|
|----------------|---------|-----------------------------------------------------------------------|----------------------|-----|

## 220 AGING &amp; DISB RESOURCE CENTER

## 85 AGING &amp; DISABILITY RESRC CENTR

## 41110 GENERAL PROPERTY TAXES

32060 D/E COUNTY TAX LEVY

35420 D/E SCSP TAX LEVY-CITY MATCH

41120 BUS 85.21 TAX LEVY-CITY MATCH

42060 BUS - COUNTY TAX LEVY

52060 BS COUNTY

55520 BS BEN SPEC CASH MATCH

62060 ADCR COUNTY TAX LEVY

65220 COA IIIB TAX LEVY-CITY MATCH

65320 CSP IIIE TAX LEVY-CITY MATCH

65420 CSP IIID TAX LEVY-CITY MATCH

74060 TAX LEVY - SUN PROGRAM

TOTAL: GENERAL PROPERTY TAXES

|            |            |      |            |      |
|------------|------------|------|------------|------|
| 16,865.00  | 16,865.00  | 0.00 | 16,865.00  | 0.00 |
| 617.00     | 617.00     | 0.00 | 617.00     | 0.00 |
| 14,194.00  | 14,194.00  | 0.00 | 14,194.00  | 0.00 |
| 13,678.00  | 13,678.00  | 0.00 | 13,678.00  | 0.00 |
| 37,490.00  | 37,490.00  | 0.00 | 37,490.00  | 0.00 |
| 3,135.00   | 3,135.00   | 0.00 | 3,135.00   | 0.00 |
| 143,301.00 | 143,301.00 | 0.00 | 143,301.00 | 0.00 |
| 3,083.00   | 3,083.00   | 0.00 | 3,083.00   | 0.00 |
| 3,363.00   | 3,363.00   | 0.00 | 3,363.00   | 0.00 |
| 228.00     | 228.00     | 0.00 | 228.00     | 0.00 |
| 20,640.00  | 20,640.00  | 0.00 | 20,640.00  | 0.00 |
| 256,594.00 | 256,594.00 | 0.00 | 256,594.00 | 0.00 |

## 43250 ADCR STATE GRANTS-GREEN CO

25710 ADCR STATE GRANT

TOTAL: ADCR STATE GRANTS-GREEN CO

|            |            |            |            |     |
|------------|------------|------------|------------|-----|
| 290,572.00 | 290,572.00 | 132,100.41 | 320,134.52 | 110 |
| 290,572.00 | 290,572.00 | 132,100.41 | 320,134.52 | 110 |

## 43530 INTERGOVERNMENTAL REVENUES

31110 D/E 85.21 GRANT

TOTAL: INTERGOVERNMENTAL REVENUES

|           |           |      |           |      |
|-----------|-----------|------|-----------|------|
| 70,970.00 | 70,970.00 | 0.00 | 70,970.00 | 0.00 |
| 70,970.00 | 70,970.00 | 0.00 | 70,970.00 | 0.00 |

## 43550 INTERGOVERNMENTAL REVENUE

36040 D/E XIX

36060 D/E FAMILY CARE

TOTAL: INTERGOVERNMENTAL REVENUE

|          |          |          |          |     |
|----------|----------|----------|----------|-----|
| 3,000.00 | 3,000.00 | 1,196.35 | 3,804.18 | 126 |
| 5,500.00 | 5,500.00 | 1,208.30 | 3,335.97 | 60  |
| 8,500.00 | 8,500.00 | 2,404.65 | 7,140.15 | 84  |

## 43560 INTERGOVERNMENTAL REVENUES

35410 D/E SCSP GRANT

45210 BUS IIIB GRANT

55510 BS BEN SPEC STATE

55710 BENEFIT SPEC - SPAP GRANT

55810 BS SHIP GRANT REVENUE

65310 ADCR IIID GRANT

85310 CSP IIIE GRANT

TOTAL: INTERGOVERNMENTAL REVENUES

|           |           |           |           |      |
|-----------|-----------|-----------|-----------|------|
| 5,551.00  | 5,551.00  | 0.00      | 1,388.00  | 25   |
| 27,747.00 | 27,747.00 | 14,708.00 | 5,994.00  | 78   |
| 39,000.00 | 39,000.00 | 10,555.00 | 21,753.00 | 44   |
| 4,600.00  | 4,600.00  | 440.00    | 17,320.00 | 142  |
| 0.00      | 0.00      | 1,646.00  | 6,550.00  | 9999 |
| 2,053.00  | 2,053.00  | 855.00    | 2,963.00  | 41   |
| 10,088.00 | 10,088.00 | 5,451.00  | 1,198.00  | 69   |
| 89,039.00 | 89,039.00 | 33,655.00 | 31,206.00 | 64   |

## 43570 INTERGOVERNMENTAL REVENUES

25915 STAND UP GRANT

TOTAL: INTERGOVERNMENTAL REVENUES

|      |      |      |          |      |
|------|------|------|----------|------|
| 0.00 | 0.00 | 0.00 | 2,890.00 | 9999 |
| 0.00 | 0.00 | 0.00 | 2,890.00 | 9999 |

## 46600 PUBLIC CHARGES FOR SERVICES

31140 D/E 85.21 CLIENT FEES

42630 BUS SPECIAL TRIP FEES

TOTAL: PUBLIC CHARGES FOR SERVICES

|          |          |          |          |     |
|----------|----------|----------|----------|-----|
| 6,500.00 | 6,500.00 | 2,212.25 | 5,735.25 | 88  |
| 1,100.00 | 1,100.00 | 0.00     | 764.75   | 226 |
| 7,600.00 | 7,600.00 | 2,212.25 | 1,394.80 | 108 |
|          |          |          | 630.05   |     |

ACS FINANCIAL SYSTEM  
11/12/2018 15:51:41  
LEVEL OF DETAIL 1.0 THRU 4.0  
FOR THE PERIOD(S) JAN 01, 2018 THROUGH SEP 30, 2018  
Revenue Guideline

| *** USER MAY NOT HAVE ACCESS ***      |  |  | *** TO ALL ACCOUNTS IN RANGE *** |       |      |
|---------------------------------------|--|--|----------------------------------|-------|------|
| Adopted Budget                        |  |  | Revised                          |       |      |
| ANNUAL ACT QTD POSTED ACT YTD POSTED  |  |  | AND IN PROCESS AND IN PROCESS    |       |      |
| PCT                                   |  |  | REMAINING                        |       |      |
| BALANCE                               |  |  | BALANCE                          |       |      |
| 220 AGING & DISB RESOURCE CENTER      |  |  |                                  |       |      |
| 85 AGING & DISABILITY RESRC CENTR     |  |  |                                  |       |      |
| 47425 REIMB FROM HEALTH DEPT          |  |  | 495.00- 9999                     | ----- | !!!! |
| 99999 REIMB FROM HEALTH DEPT          |  |  | 495.00- 9999                     | ----- | !!!! |
| TOTAL: REIMB FROM HEALTH DEPT         |  |  | 495.00- 9999                     | ----- | !!!! |
| 47450 INDIRECT COST REVENUE           |  |  |                                  |       |      |
| 00000 IN-KIND REVENUE                 |  |  | 26,933.33- 9999                  | ----- | !!!! |
| TOTAL: INDIRECT COST REVENUE          |  |  | 26,933.33- 9999                  | ----- | !!!! |
| 48500 OTHER REVENUE                   |  |  |                                  |       |      |
| 41130 BUS 85.21 CLIENT DONATIONS      |  |  | 1,854.66- 9999                   | ----- | !!!! |
| 45230 BUS IIB CLIENT DONATIONS        |  |  | 1,379.96- 9999                   | ----- | !!!! |
| 55230 BUS SSCS CLIENT DONATIONS       |  |  | 268.67- 9999                     | ----- | !!!! |
| 62040 STEPPING ON                     |  |  | 225.00- 9999                     | ----- | !!!! |
| 62070 SENIOR FAIR                     |  |  | 250.00- 125                      | ----- | !!!! |
| 72030 N&V CLIENT DONATIONS            |  |  | 31.00- 9999                      | ----- | !!!! |
| TOTAL: OTHER REVENUE                  |  |  | 4,009.29- 500                    | ----- | !!!! |
| 49300 OTHER FINANCING SOURCES         |  |  |                                  |       |      |
| 00000 GENERAL                         |  |  | 12,000.00                        | 0     |      |
| TOTAL: OTHER FINANCING SOURCES        |  |  | 12,000.00                        | 0     |      |
| TOTAL: AGING & DISABILITY RESRC CENTR |  |  | 19,954.34- 102                   | ----- |      |
| TOTAL: AGING & DISB RESOURCE CENTER   |  |  | 19,954.34- 102                   | ----- |      |

Remaining Balance → Budget  
C 736,275.00  
D < 729,296.01  
6,978.99  
Will exceed 2018 Budget Revenue!

Year-to-Date Revenue  
B 756,229.34  
In-kind < 26,933.33  
D 729,296.01

3rd Quarter Revenue  
A 183,171.94  
In-kind < 9,764.29  
173,407.65

FOR THE PERIOD(S) JAN 01, 2018 THROUGH SEP 30, 2018

\*\*\* USER MAY NOT HAVE ACCESS \*\*\*  
\*\*\* TO ALL ACCOUNTS IN RANGE \*\*\*

| 220    | AGING & DISABILITY RESOURCE  | REVISED    | ANNUAL | ENCUMBERED | ACT QTD POSTED ACT YTD POSTED<br>AND IN PROCESS AND IN PROCESS | REMAINING<br>BALANCE | PCT  |
|--------|------------------------------|------------|--------|------------|----------------------------------------------------------------|----------------------|------|
| 85     | AGING & DISABILITY RESOURCE  |            |        |            |                                                                |                      |      |
| 54600  |                              |            |        |            |                                                                |                      |      |
| 25710  | ADRC OVERHEAD                | 5,538.00   | 0.00   | 0.00       | 63,111.78                                                      | 57,573.78            | 1139 |
| 25716  | ADRC I & A LEAD              | 75,429.00  | 0.00   | 0.00       | 54,774.93                                                      | 20,654.07            | 72   |
| 25718  | ADRC I & A                   | 61,786.00  | 0.00   | 0.00       | 43,478.56                                                      | 18,307.44            | 70   |
| 25719  | ADRC DBS                     | 73,780.00  | 0.00   | 0.00       | 51,752.33                                                      | 22,027.67            | 70   |
| 25720  | WALK WITH EASE               | 0.00       | 0.00   | 0.00       | 292.00                                                         | 2,359.00             | 11   |
| 25721  | COMMUNITY OUTREACH           | 2,651.00   | 0.00   | 0.00       | 0.00                                                           | 1,876.00             | 0    |
| 25730  | STEPPING ON                  | 1,876.00   | 0.00   | 0.00       | 0.00                                                           | 4,068.00             | 0    |
| 25735  | CARETALKS                    | 0.00       | 0.00   | 0.00       | 0.00                                                           | 13,773.25            | 70   |
| 25740  | LIVING WELL                  | 4,068.00   | 0.00   | 0.00       | 33,226.75                                                      | 5,296.79             | 60   |
| 31140  | D/E VOUNTEER DRIVERS         | 47,000.00  | 0.00   | 0.00       | 8,131.21                                                       | 13,678.92            | 70   |
| 41110  | BUS MAINTENANCE              | 13,428.00  | 0.00   | 0.00       | 0.00                                                           | 3,612.00             | 0    |
| 41115  | BUS FULL TIME DRIVER         | 47,076.00  | 0.00   | 0.00       | 0.00                                                           | 0.00                 | 0    |
| 41116  | RURAL TAXI SERVICE           | 0.00       | 0.00   | 0.00       | 0.00                                                           | 0.00                 | 0    |
| 41117  | RURAL TAXI DRIVER            | 3,612.00   | 0.00   | 0.00       | 0.00                                                           | 0.00                 | 0    |
| 41118  | CITY TAXI OVERHEAD           | 0.00       | 0.00   | 0.00       | 0.00                                                           | 0.00                 | 0    |
| 41119  | CITY TAXI DRIVER             | 0.00       | 0.00   | 0.00       | 0.00                                                           | 0.00                 | 0    |
| 42060  | BUS SPECIAL TRIP ADMISSIONS  | 2,377.00   | 0.00   | 0.00       | 16,561.72                                                      | 14,184.72            | 696  |
| 42630  | BEN. SPEC. OVERHEAD          | 1,100.00   | 0.00   | 0.00       | 1,604.40                                                       | 504.40               | 145  |
| 52060  | BEN. SPEC. FULL TIME         | 900.00     | 0.00   | 0.00       | 15,683.53                                                      | 14,783.53            | 1742 |
| 52064  | I&A SPEC BENEFIT/WEELNS/PREV | 59,120.00  | 0.00   | 0.00       | 41,649.11                                                      | 17,470.89            | 70   |
| 62060  | AGING SUPPORT & OVERHEAD     | 75,498.00  | 0.00   | 0.00       | 53,864.13                                                      | 21,633.87            | 71   |
| 62061  | AGING MANAGER                | 49,576.00  | 0.00   | 0.00       | 32,800.58                                                      | 16,775.42            | 66   |
| 62062  | AGING DEPT. ASSISTANT        | 57,096.00  | 0.00   | 0.00       | 45,399.60                                                      | 11,696.40            | 79   |
| 62066  | AGING ADMINISTRATION         | 39,382.00  | 0.00   | 0.00       | 27,214.53                                                      | 12,167.47            | 69   |
| 65322  | PREVENTIVE HEALTH            | 55,170.00  | 0.00   | 0.00       | 39,236.86                                                      | 15,933.14            | 71   |
| 72060  | NEWSLETTER                   | 0.00       | 0.00   | 0.00       | 1,975.29                                                       | 1,975.29             | 9999 |
| 74060  | SUN PROGRAM                  | 17,221.00  | 0.00   | 0.00       | 11,289.69                                                      | 5,931.31             | 65   |
| 81100  | BUS TRUST 85.21              | 20,640.00  | 0.00   | 0.00       | 20,640.00                                                      | 0.00                 | 100  |
| 82000  | BUS TRUST OTHER              | 8,500.00   | 0.00   | 0.00       | 7,477.10                                                       | 1,022.90             | 87   |
| 88888  | IN-KIND EXPENSE              | 0.00       | 0.00   | 0.00       | 0.00                                                           | 0.00                 | 0    |
| 95310  | CAREGIVER SUPPORT            | 13,451.00  | 0.00   | 0.00       | 26,933.33                                                      | 26,933.33            | 9999 |
| 95315  | DESIGNATED DONATIONS         | 0.00       | 0.00   | 0.00       | 14,428.22                                                      | 977.22               | 107  |
| 59200  | TRANSFERS TO OTHER FUNDS     |            |        |            | 0.00                                                           | 0.00                 | 0    |
| 00000  | GENERAL                      | 0.00       | 0.00   | 0.00       | 0.00                                                           | 0.00                 | 0    |
| TOTAL: | TRANSFERS TO OTHER FUNDS     | 736,275.00 | 0.00   | 0.00       | 644,922.73                                                     | 91,352.27            | 87   |
| TOTAL: | AGING & DISABILITY RESOURCE  | 736,275.00 | 0.00   | 0.00       | 644,922.73                                                     | 91,352.27            | 87   |

3rd Quarter Expenses

216,153.53

In-kind 9,764.29

Indirect 32,175.81

Cost 174,213.43

Year-to-Date Expenses

644,922.73

In-kind 26,933.33

Indirect 96,527.43

Cost 521,461.97

Remaining Balance

736,275.00

< 521,461.97 >

214,813.03

Bellevue we will  
be returning \$ to  
General Fund.  
I want to thank you.

**In-Kind Revenue/Expense** – Contributions of good or services, other than cash received by the ADRC. Examples: Time driver escorts spend transporting clients to non-emergency medical appointments. Time ADRC Advisory Board members (non-County Board members) spend attending ADRC meetings. Volunteer Hourly Rate is \$11.67.

**Indirect Costs** – Costs that are not directly accountable to the ADRC. Indirect costs that are allowable expenses we can use to claim State and Federal grant money. Examples: Building Deprecation, salary and fringes of County Administration, Corporation Counsel, Finance Department, Personnel, County Treasurer, County Clerk, County Audit, telephone, etc.

# 2019 APPLICANT INFORMATION FORM

\*\*\*\*\*  
 For additional information on this Application Workbook,  
 please refer to the §85.21 Application Guidelines for CY2019  
 \*\*\*\*\*

County of Iowa

**Primary Contact for this grant program**

Name Tom Slaney  
 Telephone Number (608)930-9802 Extension \_\_\_\_\_  
 Email Address tom.slaney@iowacounty.org

**Application Preparer (if different than primary contact)**

Name Jamie Gould  
 Organization Iowa County Department of Social Services/Aging and Disability Resource Center  
 Telephone Number (608)930-9803 Extension \_\_\_\_\_  
 Email Address jamie.gould@iowacounty.org

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

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

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

|                                      |      |      |  |
|--------------------------------------|------|------|--|
| 5310                                 | 5307 | 5311 |  |
|                                      |      |      |  |
| <b>Other</b> <i>(Please explain)</i> |      |      |  |

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

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

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

|     |   |                                                                                                                                                                                    |
|-----|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| YES | X |                                                                                                                                                                                    |
| NO  |   | <i>(If no, please explain how the Americans with Disabilities Act (ADA) requirements for equivalency of service between ambulatory and non-ambulatory passengers will be met.)</i> |



# APPLICANT CHECKLIST

County of Iowa

## Required Components

Complete

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

## VEHICLE INVENTORY

County of Iowa

Instructions: Please provide your **entire** specialized transit vehicle inventory  
(Include all vehicles that are used for transportation of elders, regardless of funding source).

[illegible]

| Vehicle Type<br><i>(Mini van, Med. Bus. etc)</i> | Model Year | Current Mileage | No. of Ambulatory /<br>Wheelchair Positions<br><i>(Ambulatory/Non-Ambulatory)</i> | Enter "X" to indicate<br>vehicle funded<br>through WisDOT<br>5310 or 85.21<br>program | Place "X" in box to<br>indicate if vehicle is<br>leased to another<br>party. |
|--------------------------------------------------|------------|-----------------|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
|--------------------------------------------------|------------|-----------------|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|------------------------------------------------------------------------------|

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

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

### THIRD PARTY PROVIDERS

County of Iowa

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

[illegible]

If you have more vehicles than can fit onto one sheet, please add a copy of this sheet.  
*\*Right click on tab, select "Move or Copy", select "Vehicle Inventory", check the box to "Create a copy", click "OK".*

# TRUST FUND SPENDING PLAN

County of **Iowa**

Instructions: Please record your plan on how your county will spend down their trust fund over the next three years.  
Be as specific as possible. Do NOT include 2018 purchases made with trust funds.

| Expenditure Item<br><i>If non-vehicle capital purchase, please provide description on second page below.</i> | Planned year of purchase<br>(YYYY) | Project Cost |
|--------------------------------------------------------------------------------------------------------------|------------------------------------|--------------|
| Annual software maintenance agreement for Assisted Rides                                                     | 2019                               | \$1,750.00   |
| Vinyl lettering for new 53.10 vehicle                                                                        | 2019                               | \$2,000.00   |
| Add on options for new 53.10 (ramp, power side sliding doors & caution light package)                        | 2019                               | \$4,295.00   |
| Annual software maintenance agreement for Assisted Rides                                                     | 2020                               | \$1,750.00   |
| Annual software maintenance agreement for Assisted Rides                                                     | 2021                               | \$1,750.00   |
|                                                                                                              |                                    |              |
|                                                                                                              |                                    |              |
|                                                                                                              |                                    |              |
|                                                                                                              |                                    |              |
|                                                                                                              |                                    |              |
|                                                                                                              |                                    |              |
|                                                                                                              |                                    |              |
| Total projected cost of 3-year plan                                                                          |                                    | \$ 11,545.00 |

Estimated amount state aid to be held in trust on 12/31/2018 **\$20,919.00**

| Will auto calculate based on year entered above | Enter amount of funds planning to add for the next 3 years. If none, enter "0". |                                        |
|-------------------------------------------------|---------------------------------------------------------------------------------|----------------------------------------|
| Spending plan for 2019 = \$8,045.00             | Funds added for 2019 =                                                          | Est. balance on 12/31/19 = \$12,874.00 |
| Spending plan for 2020 = \$1,750.00             | Funds added for 2020 =                                                          | Est. balance on 12/31/20 = \$11,124.00 |
| Spending plan for 2021 = \$1,750.00             | Funds added for 2021 =                                                          | Est. balance on 12/31/21 = \$9,374.00  |

Date complete **11/12/18**

Prepared by Jamie Gould

Narrative for non-vehicle equipment purchases. \*Please explain why you are requesting WisDOT approval for an exception. If already received WisDOT approval, please list date approval received. (Hint: Use "ALT" and "Enter" to start a new paragraph.)

Iowa County Aging and Disability Resource Center is requesting permission from the Wisconsin Department of Transportation to spend \$1,750/year for the next three years from their 85.21 Trust Fund for the annual maintenance fee for their Assisted Rides software which is used to manage the driver escort program. Assisted Rides is used to schedule driver escort rides and track data that is required to be reported on the 85.21 Quarterly Ridership Report. The ADRC would like permission to spend approximately \$2,000 to have vinyl lettering installed on their new 53.10 handicapped accessible minivan, along with upgrading this vehicle with a manual lift, power side sliding doors and a caution light package.

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

## TRUST FUND SPENDING PLAN

*Continued*

County of 0

**Narrative for non-vehicle equipment purchases continued.**

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



## PROJECT DESCRIPTION

County of **Iowa**

### Instructions

- Use this section to describe a specific project that will use s.85.21 funds.
- Hint: "Alt" + "Enter" will all out to break to the next line.
- Be sure to complete all 3 pages for each project.

Project Name **Bus (Care-A-Van)**

Third Party Provider **N/A**

Date contract last updated

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

Volunteer Driver

Voucher Program

Vehicle Purchase

Management Study

Planning Study

Brief description  
of Study

Other (provide explanation)

**Driver is an employee of Iowa County**

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

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

## PROJECT DESCRIPTION, Continued

### Geography of Service

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

#### Iowa County

Arena, Avoca, Barneveld, Blanchardville, Cobb, Dodgeville, Edmund, Highland, Hollandale, Linden, Mineral Point, Monfort, Ridgeway

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

|            | Sunday | Monday  | Tuesday | Wednesday | Thursday | Friday | Saturday |
|------------|--------|---------|---------|-----------|----------|--------|----------|
| Start time |        | 8:00 am | 8:00 am |           | 8:00 am  |        |          |
| End Time   |        | 5:00 pm | 5:00 pm |           | 5:00 pm  |        |          |

Additional description  
(if applicable)

The hours may be extended depending upon the destination(s).

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

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

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

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

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

The Care-A-Van has a recommended voluntary contribution in which consumers are asked, but not required, to pay. The suggested contribution varies from \$1.50 - \$5.00, depending on the distance of the trip.

## PROJECT BUDGET

Section Description

Amount

### Annual Expenditures

Enter the amount of total expenditures for this projects

Total Expenses **\$55,223**

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

### Annual Revenue

Enter the amount for each funding source that will be used to for this projects.

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

A. §85.21 funds from annual allocation

Total from A. **\$10,671**

B. §85.21 funds from trust fund

Total from B. **\$0**

C. County Match Funds

Total from C. **\$11,483**

D. Passenger Revenue

Total from D. **\$0**

E. Older American Act (OAA) funding

Total from E. **\$33,069**

F. §5310 Operating or Mobility Management funds

Total from F. **\$0**

G. Other funds

Total from G. **\$0**

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

1.

Total

2.

Total

3.

Total

4.

Total

5.

Total

6.

Total

Revenue Total

**\$55,223**

Expenditures should equal revenue

**\$0**



## PROJECT DESCRIPTION

County of **Iowa**

### Instructions

- Use this section to describe a specific project that will use s.85.21 funds.
- Hint: "Alt" + "Enter" will all out to break to the next line.
- Be sure to complete all 3 pages for each project.

Project Name

**Driver Escort Program**

Third Party Provider

N/A

Date contract last updated

Type of Service

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

|                             |          |                            |  |  |
|-----------------------------|----------|----------------------------|--|--|
| Volunteer Driver            | <b>X</b> | Voucher Program            |  |  |
| Vehicle Purchase            |          | Management Study           |  |  |
| Planning Study              |          | Brief description of Study |  |  |
| Other (provide explanation) |          |                            |  |  |

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

The Driver Escort Program operates on a demand response system offering door-to-door service for client's non-emergency medical needs. The ADRC's mini-bus provides transportation to consumers whom are able to walk with little or no assistance or are wheelchair bound. For those who can walk with or without assistance and transfer to an automobile, we have volunteer driver escorts that utilize their own automobiles to drive our consumers to their non-emergency medical appointments. The Drivers Escort Program will transport consumers to non-emergency medical appointments located in medical facilities throughout Iowa County, along with Dane, Grant, Green, Lafayette, Richland, and Sauk Counties.

## PROJECT DESCRIPTION, Continued

### Geography of Service

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

Iowa County

Arena, Avoca, Barneveld, Blanchardville, Cobb, Dodgeville, Edmund, Highland, Hollandale, Linden, Mineral Point, Monfort, Ridgeway

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

|            | Sunday | Monday  | Tuesday | Wednesday | Thursday | Friday  | Saturday |
|------------|--------|---------|---------|-----------|----------|---------|----------|
| Start time |        | 8:00 am | 8:00 am | 8:00 am   | 8:00 am  | 8:00 am |          |
| End Time   |        | 4:30 pm | 4:30 pm | 4:30 pm   | 4:30 pm  | 4:30 pm |          |

Additional description  
(if applicable)

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

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

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

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

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

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

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



## PROJECT BUDGET

| Section Description | Amount |
|---------------------|--------|
|---------------------|--------|

### Annual Expenditures

Enter the amount of total expenditures for this projects

Total Expenses **\$76,549**

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

### Annual Revenue

Enter the amount for each funding source that will be used to for this projects.

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

A. §85.21 funds from annual allocation

Total from A. **\$28,996**

B. §85.21 funds from trust fund

Total from B. **\$1,750**

C. County Match Funds

Total from C. **\$29,203**

D. Passenger Revenue

Total from D. **\$7,000**

E. Older American Act (OAA) funding

Total from E. **\$0**

F. §5310 Operating or Mobility Management funds

Total from F. **\$0**

G. Other funds

Total from G. **\$9,600**

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

1. Family Care (Inclusa, Care Wisconsin, My Choice)

Total **\$4,600**

2. Iowa County Veteran's Service Office

Total **\$5,000**

3.

Total

4.

Total

5.

Total

6.

Total

Revenue Total

**\$76,549**

Expenditures should equal revenue

**\$0**



## PROJECT DESCRIPTION

County of Iowa

### Instructions

- Use this section to describe a specific project that will use s.85.21 funds.
- Hint: "Alt" + "Enter" will all out to break to the next line.
- Be sure to complete all 3 pages for each project.

Project Name

Rural Taxi Service

Third Party Provider

N/A

Date contract last updated

Type of Service

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

Volunteer Driver

Voucher Program

Vehicle Purchase

Management Study

Planning Study

Brief description  
of Study

Other (provide explanation)

Driver will be an employee of Iowa County

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

The rural taxi service is a new service starting in Iowa County. Iowa County will be receiving a handicapped accessible minivan with a side entry through the 2018 53.10 grant cycle. The rural taxi service will operate on a demand response system offering door-to-door service. Consumers will be transported to the destination(s) of their choice within Iowa County.

## PROJECT DESCRIPTION, Continued

### Geography of Service

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

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

|            | Sunday | Monday  | Tuesday | Wednesday | Thursday | Friday  | Saturday |
|------------|--------|---------|---------|-----------|----------|---------|----------|
| Start time |        | 8:00 am |         | 8:00 am   |          | 8:00 am |          |
| End Time   |        | 5:00 pm |         | 5:00 pm   |          | 5:00 pm |          |

Additional description  
(if applicable)

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

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

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

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

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

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



## PROJECT BUDGET

Section Description

Amount

### Annual Expenditures

Enter the amount of total expenditures for this projects

Total Expenses **\$46,109**

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

### Annual Revenue

Enter the amount for each funding source that will be used to for this projects.

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

A. \$85.21 funds from annual allocation

Total from A. **\$17,889**

B. \$85.21 funds from trust fund

Total from B. **\$6,295**

C. County Match Funds

Total from C. **\$16,225**

D. Passenger Revenue

Total from D. **\$5,700**

E. Older American Act (OAA) funding

Total from E. **\$0**

F. \$5310 Operating or Mobility Management funds

Total from F. **\$0**

G. Other funds

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

Total from G. **\$0**

1.

Total

2.

Total

3.

Total

4.

Total

5.

Total

6.

Total

Revenue Total

**\$46,109**

Expenditures should equal revenue

**\$0**



# COUNTY ELDERLY TRANSPORTATION 2019 PROJECT BUDGET SUMMARY

County of

Iowa

Project Name

Bus (Care-A-Van)

Driver Escort  
Program

Rural Taxi Service

City of Dodgeville  
Taxi Service

0

0

0

0

Totals

## Project Expenses

Total Project Expenses

\$55,223.00

\$76,549.00

\$46,109.00

\$31,953.00

\$0.00

\$0.00

\$0.00

\$0.00

\$209,834.00

## Project Revenue by Funding Source

\$85.21 Annual Allocation

\$10,671.00

\$28,996.00

\$17,889.00

\$14,833.00

\$0.00

\$0.00

\$0.00

\$0.00

\$72,389.00

\$85.21 Trust Fund

\$0.00

\$1,750.00

\$6,295.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$8,045.00

County funds

\$11,483.00

\$29,203.00

\$16,225.00

\$11,420.00

\$0.00

\$0.00

\$0.00

\$0.00

\$68,331.00

Passenger Revenue

\$0.00

\$7,000.00

\$5,700.00

\$5,700.00

\$0.00

\$0.00

\$0.00

\$0.00

\$18,400.00

Older American Act  
(OAA)

\$33,069.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$33,069.00

\$5310 grant funds

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

Total from other funds

\$0.00

\$9,600.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$9,600.00

1

\$0.00

\$4,600.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$4,600.00

2

\$0.00

\$5,000.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$5,000.00

4

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

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Expenses - revenue =

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\$0.00



**Information & Assistance Report**  
**For November/December 2018**  
Katie Batton, Sarah Blake, and Brittany Mainwaring

**Total number of contacts: 294**

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

**Referrals from Nursing Homes: 2**

**Home visits: 9**

**Scheduled Office Visits: 7**

**Number of Functional Screens Administered: 2**

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 ½ 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 is the process in which 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, Inluka, 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: 3**

IRIS, (Include, Respect, I Self-Direct) is another program which also provides funding for services. The Management Group (TMG) and Advocates4U in this area of the state 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:*** Stepping On Workshop, MCO Meetings, CCOT Meeting, Disability Mentoring Day, Dodgeville Fire Department outreach, Social Worker outreach, Stand Up & Move More Final Wrap-up meeting, Homeless Coalition Meeting, Geriatric Conference, Nursing Home & Hospital Social Worker Outreach, Former Governor Schreiber event, and Memory Screen Event

**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

**Disability Benefit Specialist-Nikki Brennum**  
Summary Report Period: 10/01/2018-10/31/2018

|                                              | 2017 | 2018 |
|----------------------------------------------|------|------|
| <b>Total Cases Opened this Month</b>         | 8    | 8    |
| <b>Client Ages</b>                           |      |      |
| 18-20                                        | 0    | 2    |
| 21-29                                        | 0    | 2    |
| 30-39                                        | 2    | 1    |
| 40-49                                        | 1    | 0    |
| 50-59                                        | 4    | 3    |
| <b>Disability</b>                            |      |      |
| Deaf/Hard of Hearing                         | 0    | 0    |
| Developmental Disability                     | 0    | 1    |
| Physical Disability                          | 4    | 3    |
| Physical Disability/Mental Illness           | 2    | 2    |
| Physical Disability/Developmental Disability | 0    | 0    |
| Mental Illness                               | 1    | 0    |
| Developmental Disability/Mental Illness      | 0    | 2    |

|                                               |                  |                  |
|-----------------------------------------------|------------------|------------------|
| <b>Number of Cases Closed for this Period</b> | 18               | 14               |
| Application, forms or Documents completed     | 0                | 3                |
| Approved at reconsideration                   | 2                | 0                |
| Approved at application                       | 6                | 7                |
| Client withdrew                               | 3                | 0                |
| Denied at application (Not Appeal)            | 3                | 2                |
| Client Transferred to another DBS             | 3                | 0                |
| Denied at Recon(Not appeal)                   | 0                | 1                |
| Referral to Private Attorney (Non Pro Bono)   | 0                | 1                |
| <b>Monetary Impact of Cases Closed:</b>       | \$218,841        | \$109,742        |
| Federal                                       | \$196,467        | \$95,240         |
| State                                         | \$22,374         | \$14,502         |
| Other                                         | \$0              | \$0              |
| <b>Year to date:</b>                          | <b>\$559,529</b> | <b>\$337,943</b> |

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:**

- Attended a Medicare Part D training
- Assisted with Grant County cases
- Attended mandatory DBS webinar
- Attended Time Reporting training
- Wrote an article for News and Views

# TRANSPORTATION COORDINATOR'S REPORT

October 2018

Submitted by Paula Daentl

| DRIVER ESCORT SERVICES           |            |             |            |             |
|----------------------------------|------------|-------------|------------|-------------|
| Current Month                    | 2017       | YTD         | 2018       | YTD         |
| Total Units of Service Provided: | 245        | 2,135       | 251        | 1,838       |
| Current Month                    | 2017       | YTD         | 2018       | YTD         |
| Driver Escort Fees Deposited:    | \$2,714.85 | \$15,864.65 | \$1,820.95 | \$13,728.30 |

| CARE A VAN SERVICES              |          |            |          |            |
|----------------------------------|----------|------------|----------|------------|
| Current Month                    | 2017     | YTD        | 2018     | YTD        |
| Total Units of Service Provided: | 551      | 4,409      | 445      | 4,334      |
| Current Month                    | 2017     | YTD        | 2018     | YTD        |
| Donations Collected:             | \$562.69 | \$4,993.26 | \$465.10 | \$6,463.19 |
| Current Month                    | 2017     | YTD        | 2018     | YTD        |
| Total Days Cancelled:            | 1        | 14         | 1        | 26         |

## Care A Van Summary

*In October, the bus went to the following locations:*

- Every Tuesday is Dodgeville day and Senior Dining Center
- Alternate Wednesdays going to Platteville and Richland Center
- Dine-out Days to Mineral Point to eat at Walker House for Halloween fun
- Dodgeville / Ridgeway to eat at Dodgeville S.U.N. Dining Site & musical entertainment at Folklore Village
- Gays Mills for lunch & apple orchard shopping
- Monroe for lunch & shopping
- Madison (west side) for lunch & shopping
- Sauk City for lunch & shopping
- Viroqua for lunch & shopping
- We averaged FIVE people per trip.

ADRC Manager's Report  
November/December 2018 ADRC Board Meeting  
Iowa County

- ADRC Staff Monthly Staff Meeting - 10/2/18
- Adult Protective Service Social Worker Training (3 of 3) -10/3/18
- Caregiver Coordinator State-wide Training - 10/9/18
- Aging Unit Plan Public Hearing - 10/11/18
- I&A Meeting - 10/12/18
- Adult Protective Services Four County Collaborative Meeting(Grant, Green, Lafayette and Iowa) - 10/15/18
- Health and Human Services Division Team Meeting - 10/16/18
- Media Training - 10/16/18
- GWAAR (Greater Wisconsin Agency on Aging Resources) Quarterly Meeting - 10/17/18
- Community Health Needs Assessment with Upland Hills - 10/18/18
- SUN Board Meeting - 10/18/18
- Regional Manager Meeting - 10/19/18
- Local ADRC Board Meeting - 10/23/18
- \* Former Governor Schreiber Caregiver Coalition Event - 10/24/18 - *well received - funny, entertaining*  
*Ppl shared experiences.*
- Regional ADRC Board Meeting - 10/25/18
- Emergency Management Exercise at Iowa County Courthouse - 10/26/18
- Time Reporting Training - 10/29/18
- Stand Up Research Project Follow-up Meeting - 10/30/18

**On a special note:**

Stepping On started 10/4/18 and ends on 11/15/18.

X Caregiver Renewal Day in Platteville - 11/9/18 - *Mike Mitchell entertained*

X Let's Talk about Pain Medicines Presentation/Prescription Drug Disposal - 12/3/18 *HHS*

X Part D Season running through 12/7/18 *Stacy*

December- Department of Social Services coordinates the Holiday Project, distributing donated clothes and presents to Iowa County residents in need.

Respectfully submitted by: Valerie Hiltbrand

# TRANSPORTATION COORDINATOR'S REPORT

December 2018

Submitted by Paula Daentl

## DRIVER ESCORT SERVICES

| Current Month                    | 2017       | YTD         | 2018       | YTD         |
|----------------------------------|------------|-------------|------------|-------------|
| Total Units of Service Provided: | 167        | 2,500       | 165        | 2,192       |
| Current Month                    | 2017       | YTD         | 2018       | YTD         |
| Driver Escort Fees Deposited:    | \$1,768.91 | \$19,268.21 | \$1,322.03 | \$17,456.85 |

## CARE A VAN SERVICES

| Current Month                    | 2017     | YTD        | 2018     | YTD        |
|----------------------------------|----------|------------|----------|------------|
| Total Units of Service Provided: | 551      | 5,369      | 328      | 5,107      |
| Current Month                    | 2017     | YTD        | 2018     | YTD        |
| Donations Collected:             | \$462.65 | \$5,990.72 | \$361.95 | \$7,674.69 |
| Current Month                    | 2017     | YTD        | 2018     | YTD        |
| Total Days Cancelled:            | 4        | 18         | 5        | 32         |

## Care A Van Summary

*In December, the bus went to the following locations:*

- Every Tuesday is Dodgeville day, Senior Dining Center, SWCAP Food Pantry
- Alternate Wednesdays going to Platteville and Richland Center
- Reedsburg for lunch & shopping
- Madison for lunch & shopping and/or movie
- Dubuque for lunch & shopping and view Holiday Light Exhibit
- Fennimore / Lancaster for lunch & shopping
- Verona for lunch & shopping
- Dine-out Days to Mineral Point to eat at Walker House for Christmas meal and games
- We averaged six people per trip.

# TRANSPORTATION COORDINATOR'S REPORT

December 2017

Submitted by Paula Daentl

## DRIVER ESCORT SERVICES

| Current Month                    | 2016       | YTD         | 2017       | YTD         |
|----------------------------------|------------|-------------|------------|-------------|
| Total Units of Service Provided: | 140        | 1,750       | 167        | 2,500       |
| Current Month                    | 2016       | YTD         | 2017       | YTD         |
| Driver Escort Fees Deposited:    | \$1,787.98 | \$17,946.47 | \$1,768.91 | \$19,268.21 |

## CARE A VAN SERVICES

| Current Month                    | 2016     | YTD        | 2017     | YTD        |
|----------------------------------|----------|------------|----------|------------|
| Total Units of Service Provided: | 331      | 5,372      | 551      | 5,369      |
| Current Month                    | 2016     | YTD        | 2017     | YTD        |
| Donations Collected:             | \$802.56 | \$6,571.20 | \$462.65 | \$5,990.72 |
| Current Month                    | 2016     | YTD        | 2017     | YTD        |
| Total Days Cancelled:            | 4        | 17         | 4        | 18         |

### Care A Van Summary

*In December, the bus went to the following locations:*

- Every Tuesday is Dodgeville day, Senior Dining Center, SWCAP Food Pantry
- Alternate Wednesdays going to Platteville and Richland Center
- Reedsburg for lunch & shopping
- Dubuque for lunch & shopping
- Monroe for lunch & shopping
- Dodgeville to Bethel Horizon for Driftless Area Land Conservancy Senior Birding Brunch
- Dine-out Days to Mineral Point to eat at Walker House for Christmas meal, fun, and fellowship

- We averaged seven people per trip.