



Fund Purpose

Aging and Disability Resource Center (ADRC) Grant Special Revenue Fund operations provide the public with accurate, unbiased information related to aging or living with a disability. Core services include: information, referral, assistance, long-term care financial and functional eligibility, long-term care options counseling, short-term case management, elderly and disability benefits counseling, prevention, early intervention, health promotion, outreach/marketing, advocacy, and emergency referrals for older adults, individuals with disabilities age 18 and above, and their families. The ADRC honors choice, supports dignity, and maximizes independence.

Financial Summary	2008	2009	2009	2010	Change From 2009	
	Actual (a)	Adopted Budget	Estimate	Budget	Adopted Budget	
					\$	%
General Government	\$1,246,465	\$3,474,420	\$2,822,761	\$3,356,565	(\$117,855)	-3.4%
Fine/Licenses	\$0	\$0	\$0	\$0	\$0	N/A
Charges for Services	\$0	\$0	\$0	\$0	\$0	N/A
Interdepartmental	\$0	\$0	\$0	\$0	\$0	N/A
Other Revenue	\$180	\$200	\$150	\$200	\$0	0.0%
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0	N/A
County Tax Levy	\$249,953	\$256,074	\$256,074	\$135,121	(\$120,953)	-47.2%
Total Revenue Sources	\$1,496,598	\$3,730,694	\$3,078,985	\$3,491,886	(\$238,808)	-6.4%
Personnel Costs	\$1,121,441	\$2,267,614	\$2,181,850	\$2,277,161	\$9,547	0.4%
Operating Expenses	\$211,574	\$1,002,516	\$368,746	\$787,709	(\$214,807)	-21.4%
Interdept. Charges	\$61,056	\$460,564	\$410,925	\$427,016	(\$33,548)	-7.3%
Fixed Assets	\$0	\$0	\$0	\$0	\$0	N/A
Total Expenditures	\$1,394,071	\$3,730,694	\$2,961,521	\$3,491,886	(\$238,808)	-6.4%
Rev. Over (Under) Exp.	\$102,527	-	\$117,464	-	-	N/A

Position Summary (FTE)

Regular Positions	14.91	27.15	26.40	27.15	0.00
Extra Help	0.32	0.44	0.44	0.44	0.00
Overtime	0.04	0.00	0.00	0.00	0.00
Total	15.27	27.59	26.84	27.59	0.00

(a) As part of Wisconsin's Long Term Care (LTC) reform initiative, the Aging and Disability Resource Center of Waukesha County (ADRC) began operation April 1, 2008. The ADRC integrated certain functions of the Waukesha County Department of Health and Human Services (DHHS) Long Term Care Division with functions from the former Department of Senior Services Information and Assistance, Benefit Specialist, and Case Management programs.

Major Departmental Strategic Outcomes and Objectives for 2010

County-Wide Key Strategic Outcome: A county that provides customers with quality programs and services

Objective 1: Through the Aging and Disability Resource Center (ADRC), provide knowledgeable, timely responses to requests for general and benefit information and assistance that meet customers' needs.

(ADRC, Benefit Specialist, Information and Assistance)

Key Outcome Indicator: Percent of positive responses to customer surveys. Positive feedback on meeting customer needs is an indication of successful implementation of an ADRC, and of provision of quality service. Based on program history, an ADRC standard of 95% positive response is an indicator of success for established programs and 80% positive response is an indicator of success for new programs.

Performance Measure:	2008 Actual	2009 Target	2009 Estimate	2010 Target
Positive responses to customer survey.				
Benefit Specialist	97.4	97.0%	97.0%	97.0%
Information & Assistance ¹	NA	95.0%	95.0%	95.0%
ADRC ¹	NA	80.0%	80.0%	80.0%

1. Measurement of customer feedback for ADRC and Information & Assistance will begin in 2009.

County-Wide Key Strategic Outcome: A county that assists at-risk citizens

Objective 2: Coordinate services that promote client independence and ability to remain living safely in their home.

(Case Management)

Key Outcome Indicator: Percent of positive responses to customer survey above ADRC standard of 95%. Service referrals are made to help keep at-risk, older adults safely in their homes. Positive feedback from clients on services that improve their quality of life and help them to remain living in their homes is an indication of a county that assists at-risk citizens.

Performance Measure:	2008 Actual	2009 Target	2009 Estimate	2010 Target
Positive customer responses to survey on remaining in home and usefulness of service.	96.5%	96.0%	96.8%	96.0%

County-Wide Key Strategic Outcome: A well planned county

Objective 3: Implement and operate an Aging and Disability Resource Center (ADRC) in Waukesha County beginning 4/1/2008 through collaboration with state, county, and community partners to provide a coordinated entry point for information and services for older adults and individuals with disabilities. (ADRC)

Key Outcome Indicator: The implementation of a resource center providing a single coordinated point of entry for aging and disability services is an indication of a well-planned county. Indicators of success include: 1) opening the ADRC; and 2) meeting the required timeframes for completion of service referrals at a 90% rate.

Performance Measure:	2008 Actual	2009 Target	2009 Estimate	2010 Target
Completion of service referrals	35.8%	90.0%	40.0%	90.0%

Objective 4: With Department of Health and Human Services, plan for the orderly transition of current county provided Long Term Care (LTC) services to one of two Managed Care Organizations (MCOs) beginning July 1, 2008 with minimal disruption to consumers. Eliminate the wait list by July 2011. (ADRC, Benefit Specialist, Information and Assistance and Case Management)

Key Outcome Indicator: The orderly transition of clients to a managed care entity and the elimination of wait lists are indications of a well-planned county. Evidence of success include: 1) Current LTC clients are transitioned to an MCO of their choice by 12/31/08. 2) Wait list clients will be transitioned to an MCO by July 2011. 3) Transition results provided at Tax levy neutral or cost savings to Waukesha County.

Performance Measure:	2008 Actual	2009 Target	2009 Estimate	2010 Target
1) Complete transition of current LTC clients to MCO.	100.0%	NA	NA	NA
2) Percent of wait list clients to Family Care	73.7%	75.0%	75.0%	75.0%
3) Tax Levy Neutral/cost savings	\$102,527	\$0.00	\$117,464	\$119,953

County-Wide Key Strategic Outcome: Cost effective services delivered with competence and skill

Objective 5: Enhance services and respond to our growing population of Veterans and Seniors by merging the departments of Health & Human Services, Aging & Disability Resource Center, and Veterans' Services Office to leverage resources, facilitate even more cooperative teamwork, and take advantage of back office efficiencies.

Key Outcome Indicator: Department merger will be effective January 1, 2010. The merger will be seamless to consumers and the ADRC will continue to meet customer needs based on an 80% positive customer survey response.

Aging & Disability Resource Center

County-Wide Key Strategic Outcome: A well planned county

Program Description

Provides a centralized place for the public to get accurate, unbiased information related to aging or living with a disability. Services include: information, referral, assistance, long-term care financial and functional eligibility, long-term care options counseling, short-term case management, prevention/early intervention, health promotion, outreach/marketing, advocacy, and emergency referrals.

	2008 Actual	2009 Budget	2009 Estimate	2010 Budget	Budget Change
Staffing (FTE)	10.22	22.26	21.76	22.26	0.00
General Government	\$934,496	\$3,151,016	\$2,408,720	\$2,922,508	(\$228,508)
Other Revenue	\$0	\$0	\$0	\$0	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
County Tax Levy	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$934,496	\$3,151,016	\$2,408,720	\$2,922,508	(\$228,508)
Personnel Costs	\$796,990	\$1,911,098	\$1,832,628	\$1,921,456	\$10,358
Operating Expenses	\$102,232	\$814,301	\$193,556	\$605,148	(\$209,153)
Interdept. Charges	\$35,274	\$425,617	\$382,536	\$395,904	(\$29,713)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$934,496	\$3,151,016	\$2,408,720	\$2,922,508	(\$228,508)

Rev. Over (Under) Exp.	-	-	-	-	-
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Program Highlights

General Government revenue is budgeted to decrease due to a projected reduction in operating expenses and is reflected in a budgeted decrease of \$228,508 in the Aging and Disability Resource Center (ADRC) State grant assigned to this program.

Personnel costs are budgeted to increase due to salaries and benefits continuation costs for the 22.26 FTEs allocated to this program, partially offset by a budgeted decrease in salary and fringe benefits costs resulting from a position reclassification.

Operating expenses overall are budgeted to decrease \$209,153 primarily due to a \$186,058 reduction in contracted ADRC Specialist costs from \$611,924 to \$425,866 resulting from actual experience during 2009, which was the first full year of operation for the ADRC. The 2009 ADRC budget for contracted ADRC Specialists was a first time budget for this program with no prior experience. Additionally, operating expenses are budgeted to decrease \$28,924 due to a reduction in mileage reimbursements from \$88,952 to \$60,028, and a \$9,856 budget reduction in tuition and registration, partially offset by a budget increase of \$10,000 in interpretation services, a budget increase of \$3,000 in advertising and legal notices, and a budget increase of \$2,685 in other operating expenses. Interdepartmental charges are budgeted to decrease primarily due to reductions of \$22,156 in postage costs, \$12,158 in assigned general/vehicle insurance costs, \$10,000 in data processing costs, and \$5,991 in assigned telephone charges, offset by an increase of \$19,735 in assigned end user technology charges, which is based on the phasing in of the full cost of computer ownership based on the charging methodology recommended by Internal Audit to better reflect technology resources utility by the program.



Activity

The ADRC provides customers a variety of services to help them make appropriate choices to meet their long-term care needs. Initial activities include information and referral, long-term care options counseling and conducting financial and functional eligibility screens. Activity for start-up year of 2008 was for a partial year with a July 1, 2008 start-up date for Managed Care Organizations (MCOs). The 2009 Estimates and 2010 Projections reflect actual experience in the ADRC during 2008 and 2009.

	2008 Act	2009 Bud	2009 Est.	2010 Proj.
Information & Assistance Contacts	7,769	21,400	18,000	18,900
Long-Term Care Options Counseling Contacts	1,050	5,240	2,700	2,835
Functional Screen Contacts	442	970	900	945

Benefit Specialist

County-Wide Key Strategic Outcome: A county that provides customers with quality programs and services

Program Description

Provides counseling, support, and options to older adults and adults with disabilities in areas related to elder and disability rights, income maintenance, housing, surrogate decision making, consumer/financial issues, legal and benefit problems, health care financing, and reverse mortgage.

	2008 Actual	2009 Budget	2009 Estimate	2010 Budget	Budget Change
Staffing (FTE)	1.79	2.00	1.75	2.00	0.00
General Government	\$195,124	\$174,482	\$267,143	\$277,440	\$102,958
Other Revenue - Donations	\$180	\$200	\$150	\$200	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
County Tax Levy	\$102,283	\$114,328	\$114,328	\$7,033	(\$107,295)
Total Revenues	\$297,587	\$289,010	\$381,621	\$284,673	(\$4,337)
Personnel Costs	\$126,627	\$145,815	\$140,298	\$140,573	(\$5,242)
Operating Expenses	\$61,914	\$130,425	\$123,505	\$130,952	\$527
Interdept. Charges	\$9,602	\$12,770	\$10,675	\$13,148	\$378
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$198,143	\$289,010	\$274,478	\$284,673	(\$4,337)
Rev. Over (Under) Exp.	\$99,444	-	\$107,143	-	-



Program Highlights

General Government revenues is budgeted to increase \$102,958 primarily due to an increase of \$120,265 in Aging and Disability Resource Center (ADRC) State grant funding, partially offset by a budgeted decrease of \$17,307 to \$0.00 in Federal Older Americans Act Title IIIB Supportive Services funding assigned to this program. Property Tax Levy for this program is reduced and shifted to other programs due to additional general government revenue and lower projected expenditures.

Personnel costs are budgeted to decrease mostly due to a lower cost employee health insurance selection partially offset by normal salaries and benefits continuation costs for the 2.00 FTEs allocated to this program.

Operating expenses overall are budgeted to increase \$527 resulting from an increase of \$5,508 in contracted Disability Benefit Specialist services from \$105,229 to \$110,737, and an increase of \$260 in software license and miscellaneous operating expenses, offset by decreases of \$1,667 in office supplies, \$1,300 in tuition and registration costs, \$1,200 in printing costs, \$1,024 in mileage reimbursement, and \$50 in assigned financial audit costs. Interdepartmental charges increase is due primarily to an increase of \$1,090 in assigned computer technology and computer support charges, partially offset by a net decrease of \$712 in other interdepartmental charges.

Activity

Elderly benefits counseling activity was available for a full year in 2008. Disability benefits counseling began on May 1, 2008. Decrease in elderly benefits counseling contacts estimated for 2009 is due to staff vacancy for part of 2009.



	2008 Act.	2009 Bud.	2009 Est.	2010 Proj.
Elderly Benefits Counseling Contacts (a)	2,529	2,468	2,276	2,605
Disability Benefits Counseling Contacts (b)	2,014	1,354	3,405	3,507

(a) For ages 60 and over.

(b) For ages 18 to 59.

Information and Assistance

County-Wide Key Strategic Outcome: A county that provides customers with quality programs and services

Program Description

Provides Older Americans Act funding assistance regarding available resources and service options that empower older adults, caregivers, and the community to make informed choices. Entry point for accessing services and filing reports of elder abuse/neglect.

	2008 Actual	2009 Budget	2009 Estimate	2010 Budget	Budget Change
Staffing (FTE)	2.44	2.51	2.51	2.51	0.00
General Government	\$91,245	\$120,940	\$118,978	\$127,371	\$6,431
Charges for Services	\$0	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
County Tax Levy	\$86,065	\$88,746	\$88,746	\$77,635	(\$11,111)
Total Revenues	\$177,310	\$209,686	\$207,724	\$205,006	(\$4,680)
Personnel Costs	\$134,789	\$144,865	\$143,438	\$147,901	\$3,036
Operating Expenses	\$30,366	\$48,513	\$43,208	\$44,398	(\$4,115)
Interdept. Charges	\$9,170	\$16,308	\$12,336	\$12,707	(\$3,601)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$174,325	\$209,686	\$198,982	\$205,006	(\$4,680)

Rev. Over (Under) Exp.	\$2,985	-	\$8,742	-	-
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Program Highlights

General Government revenues are budgeted to increase \$6,431 as a result of the Federal Older Americans Act Title IIIB Supportive Services allocated funding increase of \$3,996 from \$57,515 to \$61,511, and Title III E Family Caregiver allocated funding increase of \$2,435 from \$63,425 to \$65,860. Property Tax Levy for this program is reduced and shifted to other programs due to additional general government revenue and lower projected expenditures.

Personnel costs increases are due to salaries and benefits costs to continue the 2.51 FTEs allocated to this program.

Operating expenses are budgeted to decrease \$4,115 primarily due to a projected decrease of \$5,000 in printing costs, from \$26,000 to \$21,000, and a projected decrease of \$1,000 in publications and subscriptions, from \$4,620 to \$3,620. These budgeted decreases are partially offset by budgeted increases of \$1,800 in small equipment for 30 battery powered medication dispensers and a net increase of \$85 in other operating expenses. Interdepartmental charges budgeted decrease is due primarily to a \$3,578 reduction in projected postage costs from \$5,462 to \$1,884 and a net decrease of \$23 in other interdepartmental charges.

Activity

A variety of informational activities and resources are available to meet the needs of older adults and caregivers. The caregiver library reorganization, which had originally been scheduled for completion in 2009, is ongoing into 2010, resulting in lower activity levels than budgeted for 2009. Two general newsletters had been budgeted for 2009, however only one will be issued. Favorable pricing allowed the purchase of additional Senior Sources/ADRC Resource Guide in 2009.



	2008 Act	2009 Bud.	2009 Est.	2010 Proj.
Caregiver Library Items Used	1,216	2,815	1,338	1,470
Newsletter Distribution	2,096	4,496	2,073	2,100
Senior Sources/ ADRC Resource Guide	11,000	9,000	12,000	13,000
Presentation/Display Audience	1,231	1,210	1,224	1,285

Case Management

County-Wide Key Strategic Outcome: A county that assists at-risk citizens

Program Description

Provides needs assessments, service referrals, counseling, and support to older adults and caregivers for Federal Older Americans Act and tax levy related services.

	2008 Actual	2009 Budget	2009 Estimate	2010 Budget	Budget Change
Staffing (FTE)	0.82	0.82	0.82	0.82	0.00
General Government	\$25,600	\$27,982	\$27,920	\$29,246	\$1,264
Charges for Services	\$0	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
County Tax Levy	\$61,605	\$53,000	\$53,000	\$50,453	(\$2,547)
Total Revenues	\$87,205	\$80,982	\$80,920	\$79,699	(\$1,283)
Personnel Costs	\$63,035	\$65,836	\$65,486	\$67,231	\$1,395
Operating Expenses	\$17,062	\$9,277	\$8,477	\$7,211	(\$2,066)
Interdept. Charges	\$7,010	\$5,869	\$5,378	\$5,257	(\$612)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$87,107	\$80,982	\$79,341	\$79,699	(\$1,283)

Rev. Over (Under) Exp.	\$98	-	\$1,579	-	-
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Program Highlights

General Government revenues are budgeted to increase by \$1,264 primarily due to the Federal Older Americans Act Title IIIB Supportive Services allocated funding increases of \$728 from \$21,008 to \$21,736, and Title IIIE Family Caregiver allocated funding increases of \$536 from \$6,974 to \$7,510. Property Tax Levy for this program is reduced and shifted to other programs areas due to additional general government revenue and lower projected expenditures.

Personnel cost budgeted increase is due to salaries and benefits costs to continue the 0.82 FTEs allocated to this program.

Operating expenses are budgeted to decrease primarily due to a \$1,438 reduction in computer software license and maintenance costs and a reduction of \$628 in other operating expenses. Interdepartmental charges decrease due mostly to a reduction of \$612 in cellular phone charges.



Activity

Case management may include: discussion of multiple issues; assessment and establishing of a care plan only; or individual/group counseling of an older adult and/or caregivers. Clients may receive more than one type of contact. Beginning in 2009, single issue assessments for new clients were completed as part of an overall multiple issue assessment, resulting in fewer single issue assessment contacts for the 2009 Estimate and 2010 Projection.

Number of People Receiving Case Management Service				
	2008 Act.	2009 Bud.	2009 Est.	2010 Proj.
Multiple issues contacts	1,029	984	1,125	1,159
Single issue assessment contacts	277	300	150	175
Counseling session only	<u>73</u>	<u>75</u>	<u>95</u>	<u>100</u>
Total	1,379	1,359	1,370	1,434