Statement of Purpose

Health & Human Services – Aging & Disability Resource Center (ADRC) General Fund operations are responsible for planning, providing, and coordinating programs that address the needs of Waukesha County at-risk adults, older adults and their caregivers. These programs provide supportive services and opportunities including adult day centers, chore services, contracted community services, emergency intervention, health cost sharing, homemaker services, personal care, respite, specialized transportation, and volunteer services. The General Fund also includes activities such as the lead-reporting agency for instances of Abuse and Neglect for Adults and Elders At-Risk in Waukesha County. Programs encourage collaboration and coordination of resources, activities, and programs. Also, this fund provides services to vulnerable adults who are not eligible for the State's Family Care Benefit.

The General Fund is comprised of five program areas: Community Services, Transportation Services, Adult Protective Services (APS), Information and Assistance and Administrative Services.

Financial Summary	2009 Actual	2010 Adopted Budget	2010 Estimate	2011 Budget	Change From 2010 Adopted Budget $	%
Revenues						
General Government	$1,774,519	$1,748,293	$1,777,674	$1,767,018	$18,725	1.1%
Fine/Licenses	$0	$0	$0	$0	$0	N/A
Charges for Services	$21,388	$12,274	$11,584	$12,274	$0	0.0%
Interdepartmental	$0	$0	$0	$0	$0	N/A
Other Revenue	$57,019	$30,942	$60,990	$57,616	$26,674	86.2%
Appr. Fund Balance	$230,000	$0	$0	$0	$0	N/A
County Tax Levy	**$2,652,463**	**$2,499,602**	**$2,499,602**	**$2,741,885**	**$242,283**	**9.7%**
Total Revenues Sources	**$4,735,389**	**$4,291,111**	**$4,349,850**	**$4,578,793**	**$287,682**	**6.7%**
Expenditures						
Personnel Costs	$1,458,642	$1,533,323	$1,519,143	$1,548,117	$14,794	1.0%
Operating Expenses	$2,197,662	$2,606,976	$2,352,205	$2,867,954	$260,978	10.0%
Interdept. Charges	$138,849	$150,812	$145,969	$162,722	$11,910	7.9%
Fixed Assets	$0	$0	$0	$0	$0	N/A
Total Expenditures	**$3,795,153**	**$4,291,111**	**$4,017,317**	**$4,578,793**	**$287,682**	**6.7%**
Rev. Over (Under) Exp.	$940,236	-	$332,533	-	-	N/A
Position Summary (FTE)						
Regular Positions	19.14	20.14	20.14	19.49	(0.65)	
Extra Help	0.44	0.44	0.44	0.44	0.00	
Overtime	0.00	0.00	0.00	0.00	0.00	
Total	19.58	20.58	20.58	19.93	(0.65)	

Major Departmental Strategic Outcomes and Objectives for 2011

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

Objective 1: Provide thorough, comprehensive and timely assessments and dispositional services. (Adult Protective Services)

Key Outcome Indicator: Percentage of court ordered comprehensive evaluations completed within 96 hours (4 days) prior to final court hearing. Department standard is 100%.

Performance Measure:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Percentage of completed comprehensive evaluations within 96 hours prior to court hearing	100%	100%	100%	100%

Objective 2: Provide training to Aging and Disability Resource Center (ADRC) staff and Managed Care Organizations fulfilling Long Term Care responsibility in Waukesha County. The training will focus on proper collection and reporting of information related to reports of abuse and neglect of vulnerable adults and elders, in accordance with the recently revised protective services and guardianship law, and to enhance service coordination.

Key Outcome Indicator: The number of trainings offered to ADRC staff by the Adult Protective Services (APS) supervisor.

Work Load Activity Measure:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Number of trainings	3	2	3	3

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

Objective 3: Provide knowledgeable, timely responses to requests for information and assistance while providing useful services that meet customers' assessed needs. (Community Services, Information and Assistance/Case Management)

Key Outcome Indicator: Percent of positive responses to customer survey. Positive feedback on meeting customer needs is an indication of quality service. Based on program history, a Department standard of 95% positive response is an indicator of success.

Performance Measure:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Positive responses to customer survey regarding quality and customer needs being met.	97.7%	96.0%	96.3%	96.0%

Objective 4: Maintain volunteer involvement through outreach targeted to the community and business retirees. (Community Services)

Key Outcome Indicator: Stabilization in the number of volunteers and the valuation of volunteer time. Availability of volunteers is an indication of cost-effective services delivered with competence and skill. In recent years the ADRC had experienced a decrease in the number of volunteers. This is primarily due to the availability of fewer group members, and nutrition site closures. Additionally most volunteers are over age 60 and as they age, many are now retiring from volunteering. Maintaining previous year's volunteer levels promotes stabilization of services and is an indicator of success.

Performance Measure:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Number of volunteers	1,083	1,416	1,083	1,083
Percent increase/decrease (-)	(15.7%)	5.0%**	0.0%	0.0%
Valuation of volunteer hours	$343,167	$370,912	$343,167	$346,599*
Percent increase/decrease (-)	(1.8%)	3.0%**	0.0%	1.0%

*2011 volunteer valuations of $9.59/hr and $12.45/hr are based on projected Waukesha County 2011 pay ranges for unclassified and semi-skilled positions plus a 25% estimated benefit cost factor.

**Percentages based on the 2009 Estimates. Beginning with 2010 Estimate the objective is to maintain rather than increase the volunteer base and valuation. The 2010 budget estimated a higher number of group volunteers but is reduced based on current year trends.

Objective 5: Provide cost effective transportation options that allow older adults to maintain their independence. (Transportation Services)

Key Outcome Indicator: Shared-Fare taxi and shuttle services are the most cost effective specialized transportation alternatives for older people and people with disabilities in the county. Provision of technical support and guidance for service start-up of Shared-Fare taxi/shuttle service area promotes competent and skilled delivery of a cost effective service. During the start-up year, potential annual cost savings based on comparison of Shared-Fare taxi/shuttle use versus RideLine use in the new area will serve as an indicator of success. No start-ups are projected for 2011. Positive Shared-Fare taxi customer feedback on maintaining independence indicates quality service.

Performance Measure:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Positive customer feedback on maintaining independence using the Specialized Transportation Program.	96.1%	95.0%	96.7%	95.0%

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

Program Description

Services include a wide range of short-term and long-term supportive home care, adult day center care, and intervention programs for older adults and their families. These programs provide supportive services and opportunities including adult day centers, chore services, contracted community services, emergency intervention, health cost sharing, homemaker services, personal care, respite and volunteer services.

	2009 Actual	2010 Budget	2010 Estimate	2011 Budget	Budget Change
Staffing (FTE)	**2.77**	**2.70**	**2.70**	**2.35**	**(0.35)**
General Government	$312,916	$340,760	$363,769	$359,807	$19,047
Interdepartmental	$0	$0	$0	$0	$0
Charges for Services	$4,538	$4,624	$3,934	$4,624	$0
Other Revenue	$21,015	$21,756	$24,470	$24,491	$2,735
Appr. Fund Balance	$0	$0	$0	$0	$0
County Tax Levy	$281,007	$269,971	$269,971	$239,104	($30,867)
Total Revenues	**$619,476**	**$637,111**	**$662,144**	**$628,026**	**($9,085)**
Personnel Costs	$177,175	$190,336	$183,930	$169,478	($20,858)
Operating Expenses	$322,583	$431,135	$423,381	$444,570	$13,435
Interdept. Charges	$18,140	$15,640	$15,322	$13,978	($1,662)
Fixed Assets	$0	$0	$0	$0	$0
Total Expenditures	**$517,898**	**$637,111**	**$622,633**	**$628,026**	**($9,085)**

Rev. Over (Under) Exp.	$101,578	-	$39,511	-	-

Program Highlights

General Government revenues overall increase $19,047 mainly due to an increase from State reinstatement of Alzheimer's Family Caregiver Support Program (AFCSP) grant funding which was not budgeted for in 2010; and federal Title IIIE Family Caregiver support funding is budgeted to increase $6,800 to $71,005. These increases are partially offset by a federal Title IIIB Supportive Services funding decrease of $35,153 from $185,393 to $150,240; and Elder Abuse direct services funding decreasing by $1,133 from $75,535 to $74,404. Charges For Services budgeted at $4,624 represents workshop fees for conferences. Other revenues increase slightly due to a projected increase in client donations of $2,735 based on the 2010 estimate. County Tax levy is reduced in this program by $30,867 resulting primarily from projected increases in the revenues above and decreases in expenditures for adult day care and homemaker services based on prior year actual spending levels.

Net personnel costs decrease $20,858 mostly due to position reclassifications and the unfunding of 0.35 FTE of an account clerk II in this program of $20,546, partially offset by salaries and benefits costs to continue the remaining 2.35 FTEs allocated to this program for 2011.

Operating expenses overall increase primarily due to the State's reinstatement of the AFCSP grant funds as indicated above. Personal care/respite expenditures increase by $8,435 and home health care/bathing expenditures increase by $6,888. These increases are partially offset by a budgeted decrease of $22,552 in adult day care expenditures; $10,000 in household care/homemaker expenditures; and $8,133 in contracted services to be more in line with 2009 actual spending levels and 2010 estimated spending.

Interdepartmental charges overall decrease is mostly due to allocated End User Technology computer replacement, maintenance and support charges allocated to this program which decreases $2,083 based on the full cost of computer ownership methodology as recommended by internal audit.

Activity

Clients Receiving Community Services					
2007 Act.	**2008 Act.**	**2009 Act.**	**2010 Bud.**	**2010 Est.**	**2011 Proj.**
989	961	1,093	1,015	1,010	1,010

Transportation Services

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

Program Description

Contracts for accessible specialized transportation services (Shared-Fare Taxi, Shuttle Services, and RideLine) for older people and individuals with disabilities.

	2009 Actual	2010 Budget	2010 Estimate	2011 Budget	Budget Change
Staffing (FTE)	**1.64**	**1.60**	**1.60**	**1.50**	**(0.10)**
General Government	$750,355	$754,210	$765,407	$774,845	$20,635
Interdepartmental	$0	$0	$0	$0	$0
Other Revenue	$0	$0	$0	$0	$0
Appr. Fund Balance	$0	$0	$0	$0	$0
County Tax Levy	$426,208	$444,033	$444,033	$390,593	($53,440)
Total Revenues	**$1,176,563**	**$1,198,243**	**$1,209,440**	**$1,165,438**	**($32,805)**
Personnel Costs	$108,980	$113,760	$108,173	$106,665	($7,095)
Operating Expenses	$952,032	$1,073,067	$988,201	$1,047,463	($25,604)
Interdept. Charges	$12,532	$11,416	$11,606	$11,310	($106)
Fixed Assets	$0	$0	$0	$0	$0
Total Expenditures	**$1,073,544**	**$1,198,243**	**$1,107,980**	**$1,165,438**	**($32,805)**
Rev. Over (Under) Exp.	$103,019	-	$101,460	-	-

Program Highlights

General Government revenues are budgeted to increase based on a projected increase of $26,505, or 3.5%, in the State of Wisconsin Department of Transportation (WIDOT) Specialized Transportation grant. The increase is partially offset by reallocating $5,870 for administration cost recovery for this grant to the Administrative Services Division. The WIDOT grant requires a 20% local cash match or tax levy funding which the County significantly overmatches in order to provide more transport services to the elderly and disabled. County Tax Levy for this program area decreases in the 2011 Budget by $53,440 mainly due to the increase in revenue above and estimated decreases in shared-fare taxi and RideLine services expenditures.

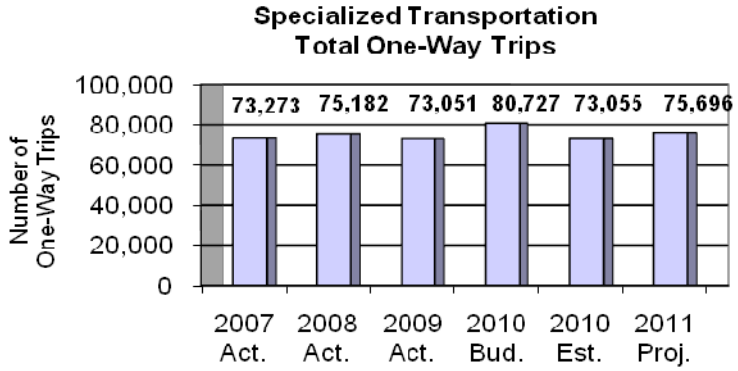
Net personnel costs are budgeted to decrease due to position reclassifications and the unfunding of 0.10 FTE of an account clerk II allocated to this program of $5,870, partially offset by salaries and benefits costs to continue increases for the 1.50 FTEs assigned to this program for 2011.

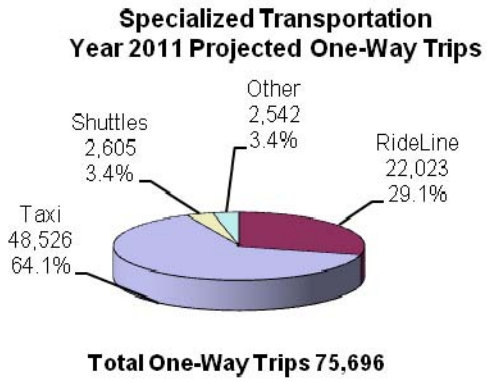
Operating expenses are budgeted to decrease overall about $25,600 primarily due to an estimated decrease of $25,500 in transportation services expenditure appropriations. This includes a decrease of $20,640 in Shared-Fare Taxi expenditures due to an anticipated decrease of 4,175 one-way trips, and a decrease of $5,386 in RideLine expenditures due to an anticipated decrease of 354 one-way trips. The number of trips budgeted is still an increase over the 2010 total year estimates. The budget includes an anticipated 3% vendor rate increase for RideLine Service. This is more than negated by the projected decrease in one-way trips.

Activity

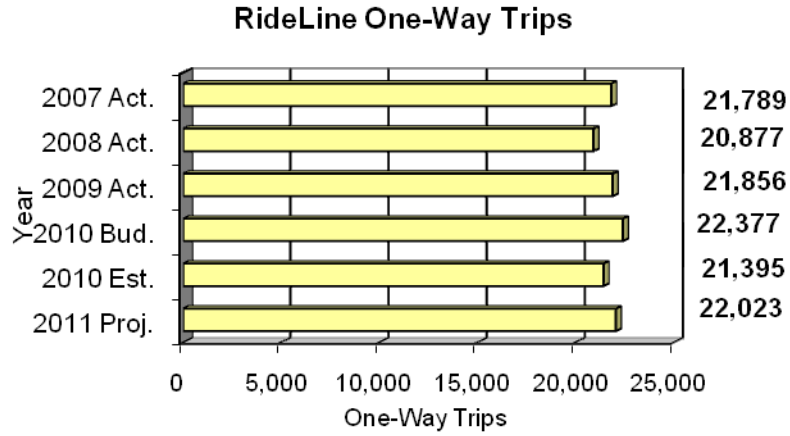
Net Average Cost Per One-Way Trip						
	2007 Act.	**2008 Act**	**2009 Act**	**2010 Bud.**	**2010 Est.**	**2011 Proj.**
Shared-Fare Taxi	$4.55	$4.82	$4.88	$5.22	$5.08	$5.24
RideLine	$24.73	$26.72	$27.78	$28.95	$28.26	$29.17

Activity, continued





Overall, the 2011 Specialized Transportation Program budget includes a 6.2% decrease of 5,031 one-way trips from the 2010 Budget (to be more in line with prior years actuals), but a 3.6% increase of 2,641 one-way trips from the 2010 Estimate, for a total of 75,696.



The number of one-way RideLine trips is expected to adjust from the 2010 Budget level, but increase from the 2010 Estimate by 628 trips or 2.9% based on the level of trips used in 2007-2009 Actuals.

Shared-fare taxi service is expected to decrease by 4,175 one-way trips to adjust from the 2010 Budget level, but increase by 1,500 one-way trips or 3.2% from the 2010 Estimate.

Adult Protective Services

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

Program Description

Provides cost effective service intervention for vulnerable adults to ensure their safety and well-being, protects them from exploitation and harm, and preserves their maximum level of personal independence.

	2009 Actual	2010 Budget	2010 Estimate	2011 Budget	Budget Change
Staffing (FTE)	**10.00**	**11.00**	**11.00**	**11.00**	**0.00**
General Government	$587,431	$486,706	$486,706	$486,706	$0
Charges for Services	$16,850	$7,650	$7,650	$7,650	$0
Other Revenue	$35,958	$9,161	$36,495	$33,100	$23,939
Appr. Fund Balance	$230,000	$0	$0	$0	$0
County Tax Levy	**$1,634,312**	**$1,505,406**	**$1,505,406**	**$1,825,084**	**$319,678**
Total Revenues	**$2,504,551**	**$2,008,923**	**$2,036,257**	**$2,352,540**	**$343,617**
Personnel Costs	$835,805	$876,288	$877,579	$918,215	$41,927
Operating Expenses	$878,784	$1,039,068	$882,319	$1,325,463	$286,395
Interdept. Charges	$76,208	$93,567	$89,398	$108,862	$15,295
Fixed Assets	$0	$0	$0	$0	$0
Total Expenditures	**$1,790,797**	**$2,008,923**	**$1,849,296**	**$2,352,540**	**$343,617**
Rev. Over (Under) Exp.	$713,754	-	$186,961	-	-

Program Highlights

Budgeted general government revenues include Supportive Home Care and state Basic County Allocations funding which are unchanged in the 2011 budget. Charges for Services is budgeted at $7,650 for adults who are found to be legally incompetent and are a danger to themselves or others. The Waukesha County Department of Health and Human Services (HHS) is obligated to provide protection and services. HHS refers adults that need medical assistance to Waukesha Memorial Hospital for treatment. HHS pays for the episode and then bills the client to recapture the costs. Other revenue increases $23,939 due to an estimated increase in social security reimbursements for clients served by this program where the County is the protective payee. County Tax Levy increases $319,678 related to estimated expenditure increases outlined below.

Net personnel costs are budgeted to increase by $3,812 per FTE about 4.7% or $41,927 reflecting salaries and employee benefits continuation costs for the 11.0 FTEs allocated to this program.

Operating expenses increase $286,395 mostly due to a budgeted increase of $281,100 to $611,375 for increased costs estimated for approximately 25 Waukesha County residents at Clearview Intensive Care Facility for the Mentally Retarded (ICFMR) in Dodge County, and to an anticipated increase of $5,295 to $582,409 for contracted services for five clients at State treatment facilities.

Interdepartmental charges overall are budgeted to increase $15,295 primarily due to budgeted increases of $16,244 in assigned End User Technology computer replacement, maintenance and support charges based on the full cost of computer ownership methodology as recommended by internal audit and $1,655 for estimated higher legal services, partially offset by a decrease of $1,488 to $2,640 in telephone charges and a decrease of $1,064 to $9,190 in Sheriff's transportation charges for client transports.

Activity

	2009 Act.	2010 Bud.	2010 Est.	2011 Bud.	Change
Number of Watts Court Ordered Assessment	331	340	340	350	10
Average Caseload Per Dispositional Worker (6)	27	37	38	38	1
Emergency Protective Placements	63	75	65	68	(7)

Information and Assistance/Case Management

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

Program Description

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

	2009 Actual	2010 Budget	2010 Estimate	2011 Budget	Budget Change
Staffing (FTE)	**3.33**	**3.33**	**3.33**	**3.23**	**(0.10)**
General Government	$123,817	$156,617	$151,792	$141,530	($15,087)
Other Revenue	$0	$0	$0	$0	$0
Appr. Fund Balance	$0	$0	$0	$0	$0
County Tax Levy	$141,746	$128,088	$128,088	$131,698	$3,610
Total Revenues	**$265,563**	**$284,705**	**$279,880**	**$273,228**	**($11,477)**
Personnel Costs	$204,212	$215,132	$212,975	$217,567	$2,435
Operating Expenses	$35,014	$51,609	$47,451	$38,869	($12,740)
Interdept. Charges	$16,677	$17,964	$17,149	$16,792	($1,172)
Fixed Assets	$0	$0	$0	$0	$0
Total Expenditures	**$255,903**	**$284,705**	**$277,575**	**$273,228**	**($11,477)**

Rev. Over (Under) Exp.	$9,660	-	$2,305	-	-

Program Highlights

General Government revenues decrease $15,087, including a Federal Older Americans Act Title IIIB Supportive Services funding decrease of $4,686 from $83,247 to $78,561 after reallocating $5,870 for Administrative Cost Recovery. Also, federal Title IIIE Family Caregiver Support funding decreases by $10,401 from $73,370 to $62,969. County Tax Levy for this program area increases $3,610, partially covering the federal revenue decreases mentioned above.

Net personnel costs increase mostly due to salaries and benefits continuation costs for the 3.23 FTEs allocated to this program for 2011, mostly offset by position reclassifications and reduction of 0.10 FTEs in this program.

Operating expenses decrease is mostly related to lower printing costs which are budgeted to decrease by $10,816. Also, office/promotional supply and postage costs are estimated to decrease by $1,000.

Interdepartmental charges decrease primarily due to a decrease in postage costs.

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Activity

A variety of informational activities and resources are available to meet the needs of older adults and caregivers.

	2009 Act	2010 Bud.	2010 Est.	2011 Proj.	Change from 2010
Caregiver Library Items Used)	502	1,470 (a)	477	487	983
Newsletter Distribution	1,673	2,100	2,250	2,250	150
Senior Sources/ ADRC Resource Guide	11,000	13,000	12,500	15,000	2,000
Presentation/Display Audience	1,294	1,285	1,285	1,300	15

(a) The 2010 Budget reflects a higher estimated distribution that is not being realized due to reorganization of partner/ satellite agencies.

Case management may include discussion of multiple issues; assessment or 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.

	2009 Act.	2010 Bud.	2010 Est.	2011 Proj.	Change From 2010
Total Clients Receiving Case Management Services	1,519	1,434	1,565	1,570	136

Administrative Services

Program Description

Along with providing overall ADRC management, Administrative Services is responsible for coordinating and providing strategic planning, liaison to Human Resources, data reporting, and operational and fiscal support.

	2009 Actual	2010 Budget	2010 Estimate	2011 Budget	Budget Change
Staffing (FTE)	**1.95**	**1.95**	**1.95**	**1.85**	**(0.10)**
General Government	$0	$10,000	$10,000	$4,130	($5,870)
Other Revenue	$46	$25	$25	$25	$0
Appr. Fund Balance	$0	$0	$0	$0	$0
CountyTax Levy	$169,190	$152,104	$152,104	$155,406	$3,302
Total Revenues	**$169,236**	**$162,129**	**$162,129**	**$159,561**	**($2,568)**
Personnel Costs	$132,470	$137,807	$136,486	$136,192	($1,615)
Operating Expenses	$9,249	$12,097	$10,853	$11,589	($508)
Interdept. Charges	$15,292	$12,225	$12,494	$11,780	($445)
Fixed Assets	$0	$0	$0	$0	$0
Total Expenditures	**$157,011**	**$162,129**	**$159,833**	**$159,561**	**($2,568)**

Rev. Over (Under) Exp.	$12,225	-	$2,296	-	-

Program Highlights

General Government revenue decrease of $5,870 results from moving administrative cost recovery revenues to Health and Human Services Administration from the ADRC grant.

Net personnel costs are budgeted to decrease slightly due to position reclassifications and the unfunding of 0.10 FTE of an account clerk II in this program of $5,870, partially offset by salaries and employee benefits continuation costs for the remaining 1.85 FTEs allocated to this program for 2011.

Operating expenses and interdepartmental charges decrease slightly.