



Statement of Fund Purpose

Aging and Disability Resource Center (ADRC) is a Special Revenue Fund operation providing 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	2009	2010	2010	2011	Change From 2010	
	Actual (a)	Adopted Budget	Estimate (a)	Budget	Adopted Budget	
					\$	%
General Government	\$2,923,089	\$3,199,948	\$2,817,176	\$3,150,771	(\$49,177)	-1.5%
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 (a)	\$152,383	\$200	\$102,833	\$150	(\$50)	-25.0%
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0	N/A
County Tax Levy	\$114,328	\$7,033	\$7,033	\$0	(\$7,033)	-100.0%
Total Revenue Sources	\$3,189,800	\$3,207,181	\$2,927,042	\$3,150,921	(\$56,260)	-1.8%
Personnel Costs	\$1,893,687	\$2,062,029	\$2,046,921	\$2,130,038	\$68,009	3.3%
Operating Expenses	\$251,398	\$736,100	\$372,760	\$646,026	(\$90,074)	-12.2%
Interdept. Charges	\$381,960	\$409,052	\$399,109	\$374,857	(\$34,195)	-8.4%
Fixed Assets	\$0	\$0	\$0	\$0	\$0	N/A
Total Expenditures	\$2,527,045	\$3,207,181	\$2,818,790	\$3,150,921	(\$56,260)	-1.8%
Rev. Over (Under) Exp.	\$662,755	-	\$108,252	-	-	N/A

Position Summary (FTE)

Regular Positions	24.26	24.26	24.26	24.21	(0.05)
Extra Help	0.00	0.00	0.00	0.00	0.00
Overtime	0.00	0.00	0.00	0.00	0.00
Total	24.26	24.26	24.26	24.21	(0.05)

Additional Human Res.

Budgeted

Contracted DD Benefit Specialists	2.00	2.00	2.00	2.00	0.00
Contracted ADRC Specialists	10.00	7.00	7.00	5.00	(2.00)

(a) Other revenues relate to prior period revenue resulting from conservative revenue accruals in the prior year.

Major Departmental Strategic Outcomes and Objectives for 2011

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:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Positive responses to customer survey.				
Benefit Specialist	100.0%	97.0%	97.6%	97.0%
ADRC Information & Assistance	97.3%	95.0%	95.0%	95.0%

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:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Positive customer responses to survey on remaining in home and usefulness of services provided.	96.8%	96.0%	96.9%	96.0%

County-Wide Key Strategic Outcome: A well planned county

Objective 3: Operate an Aging and Disability Resource Center (ADRC) in Waukesha County 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 resource center provides a single coordinated point of entry for aging and disability services, which is an indication of a well-planned county. Indicator of success includes meeting the required timeframes for completion of service referrals at a 90% rate.

Performance Measure:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Completion of service referrals				
Pre-Admission Consultation	50.3%	90.0%	90.0%	90.0%
Enrollment following Application Date	59.1%	90.0%	60.0%	90.0%

Objective 4: Complete the transition of clients on the wait list to Managed Care Organizations as part of the State's Family Care Program dependant on the State providing sufficient funding resources to accomplish this objective. (ADRC and Benefit Specialist)

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 includes annual transition of wait list clients to an MCO,

Performance Measure:	2009 Actual	2010 Target	2010 Estimate	2011 Target
Percent of eligible wait list clients to Family Care	36.0%	50.0%	58.0%	100.0%*

*Dependent on sufficient State funding to address wait list clients transition to the Manage Care Organizations.

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.

	2009 Actual (a)	2010 Budget	2010 Estimate (a)	2011 Budget	Budget Change
Staffing (FTE)	22.26	22.26	22.26	22.21	(0.05)
General Government	\$2,592,461	\$2,922,508	\$2,559,053	\$2,859,463	(\$63,045)
Other Revenue (a)	\$152,234	\$0	\$74,947	\$0	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
County Tax Levy	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$2,744,695	\$2,922,508	\$2,634,000	\$2,859,463	(\$63,045)
Personnel Costs	\$1,769,826	\$1,921,456	\$1,909,141	\$1,985,840	\$64,384
Operating Expenses	\$144,862	\$605,148	\$263,024	\$510,138	(\$95,010)
Interdept. Charges	\$372,058	\$395,904	\$388,402	\$363,485	(\$32,419)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$2,286,746	\$2,922,508	\$2,560,567	\$2,859,463	(\$63,045)

Rev. Over (Under) Exp.	\$ 457,949	\$ -	\$ 73,433	\$ -	\$ -
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(a) Other revenues relate to prior period revenue resulting from conservative revenue accruals in the prior year.



Program Highlights

General Government revenue decrease is due to a budgeted decrease of \$63,045 in the Aging and Disability Resource Center (ADRC) State grant based on lower estimated expenditures after reallocating \$116,118 for administration cost recovery of this grant to the Administrative Services Division.

Net personnel costs are budgeted to increase \$64,384 due to salaries and benefits continuation costs adjusted for benefit changes for the 22.21 FTEs allocated to this program for 2011, partially offset by position reclassifications and the unfunding of 0.05 FTE of an account clerk II in this program of \$2,936.

Operating expenses overall are budgeted to decrease \$95,010 to \$510,138 primarily due to a projected decrease of \$104,000 to \$321,866 in contracted ADRC specialists from 7 to 5, partially offset by increases of \$8,880 in printing.

Interdepartmental charges decrease overall by \$32,419 due primarily to budgeted decreases of \$27,797 in allocated End User Technology for computer replacements, maintenance and support charges and \$4,788 in postage costs.



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. Beginning in 2010 the definition for Functional Screen contacts changed to one contact per functional screen, resulting in fewer of those contact activities recorded.

	2009 Act	2010 Bud	2010 Est.	2011 Proj.
Information & Assistance Contacts	18,869	18,900	20,700	21,000
Long-Term Care Options Counseling Contacts	3,470	2,835	5,240	5,500
Functional Screen Contacts	811	945	720	720

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.

	2009 Actual	2010 Budget	2010 Estimate	2011 Budget	Budget Change
Staffing (FTE)	2.00	2.00	2.00	2.00	0.00
General Government	\$330,628	\$277,440	\$258,123	\$291,308	\$13,868
Other Revenue - Donations	\$149	\$200	\$27,886	\$150	(\$50)
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
County Tax Levy	\$114,328	\$7,033	\$7,033	\$0	(\$7,033)
Total Revenues	\$445,105	\$284,673	\$293,042	\$291,458	\$6,785
Personnel Costs	\$123,861	\$140,573	\$137,780	\$144,198	\$3,625
Operating Expenses	\$106,536	\$130,952	\$109,736	\$135,888	\$4,936
Interdept. Charges	\$9,902	\$13,148	\$10,707	\$11,372	(\$1,776)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$240,299	\$284,673	\$258,223	\$291,458	\$6,785
Rev. Over (Under) Exp.	\$204,806	-	\$34,819	-	-



Program Highlights

General Government revenues is budgeted to increase \$13,868 due to an estimated increase in Aging and Disability Resource Center (ADRC) state grant funding allocated to this program area. County Tax Levy decreases by \$7,033 in the 2011 budget and is used in other areas within the HHS department.

Net personnel costs are budgeted to increase due to salaries and benefits costs to continue for the 2.00 FTEs allocated to this program.

Operating expenses overall are budgeted to increase \$4,936 mostly resulting from an increase of \$10,423 in contracted disability benefit specialist services from \$110,737 to \$121,160, partly offset by projected decrease of \$3,700 in mileage reimbursement and \$1,600 in reductions of office supplies, printing, publications/memberships.

Interdepartmental charges overall decrease mainly relates to reductions in postage and telephone charges.

Activity

Decrease in disability benefits counseling contacts for 2010 is due to staff vacancy for part of 2010.



	2009 Act.	2010 Bud.	2010 Est.	2011 Proj.
Elderly Benefits Counseling Contacts (a)	2,968	2,605	2,960	2,960
Disability Benefits Counseling Contacts (b)	5,050	3,507	4,452	5,050

- (a) For ages 60 and over. Includes client contacts only.
- (b) For ages 18 to 59. Includes client and third party contacts.

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