

Aging & Disability Resource Center Fund

Aging & Disability Resource Center Fund Purpose/Summary

Fund Purpose

Aging and Disability Resource Center (ADRC) 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	2007	2008	2008	2009	Change From 2008	
	Actual (a)	Adopted Budget	Estimate	Budget	\$	%
General Government	\$205,712	\$1,711,641	\$1,613,227	\$3,474,420	\$1,762,779	103.0%
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	\$100	\$200	\$200	\$200	\$0	0.0%
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0	N/A
County Tax Levy (b)	\$347,849	\$249,953	\$249,953	\$256,074	\$6,121	2.4%
Total Revenue Sources	\$553,661	\$1,961,794	\$1,863,380	\$3,730,694	\$1,768,900	90.2%
Personnel Costs	\$419,204	\$1,172,994	\$1,132,013	\$2,267,614	\$1,094,620	93.3%
Operating Expenses	\$57,906	\$632,125	\$569,570	\$1,002,516	\$370,391	58.6%
Interdept. Charges	\$29,715	\$156,675	\$151,148	\$460,564	\$303,889	194.0%
Fixed Assets	\$0	\$0	\$0	\$0	\$0	N/A
Total Expenditures	\$506,825	\$1,961,794	\$1,852,731	\$3,730,694	\$1,768,900	90.2%
Rev. Over (Under) Exp.	\$46,836	-	\$10,649	-	-	N/A

Position Summary (FTE)

Regular Positions (c)	6.10	14.91	14.91	27.15	12.24
Extra Help	0.44	0.44	0.44	0.44	0.00
Overtime	0.12	0.11	0.07	0.00	(0.11)
Total	6.66	15.46	15.42	27.59	12.13

- (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. Data for 2007 Actuals is restated from applicable previous years' General Fund programs.
- (b) For the 2008 Budget, County Tax Levy for the ADRC has been transferred into the Aging and Disability Resource Center Fund from previous Department of Senior Services General Fund programs. There is no increase in County Tax Levy related from the implementation of the ADRC.
- (c) Includes 11.52 FTE shifted from Long Term Care Fund.

Current and Proposed Capital Projects

Proj. #	Project Name	Expected Completion Year	Total Project Cost	Est. % Complete End of 08	Estimated Operating Impact	A=Annual T=One-Time
200825	Aging and Disability Resource Center	2008	\$450,000	100%	(d)	T

Refer to Capital Project section of the budget book for additional detail.

- (d) Cost savings estimated of about \$106,000 was identified in the 2008 Budget relates to start up of the Aging and Disability Resource Center as part of the Wisconsin Long Term Care reform initiative.

Aging & Disability Resource Center Outcomes/ Objectives

Aging & Disability Resource Center Fund

Major Departmental Strategic Outcomes and Objectives for 2009

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, and 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, a Department 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:	2007 Actual	2008 Target	2008 Estimate	2009 Target
Positive responses to customer survey.				
Benefit Specialist	100.0%	95.0%	97.4%	97.0%
Information & Assistance ¹	NA	95.0%	NA	95.0%
ADRC	NA	NA	NA	80.0%

1. Measurement of customer feedback for 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 Department 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:	2007 Actual	2008 Target	2008 Estimate	2009 Target
Positive customer responses to survey on remaining in home and usefulness of service.	96.5%	95.0%	95.8%	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:	2007 Actual	2008 Target	2008 Estimate	2009 Target
Completion of service referrals	NA	90.0%	90.0%	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 2010. (ADRC)

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 or six months after the implementation of start-up of the MCOs. 2) Wait list clients will be transitioned to an MCO by July 2010, or 24 months after implementation of start-up of the MCOs. 3) Transition results provided at Tax Levy neutral or cost savings to Waukesha County.

Performance Measure:	2007 Actual	2008 Target	2008 Estimate	2009 Target
Complete transition of current LTC clients to MCO.	NA	100.0%	100.0%	NA
Percent of clients off wait list	NA	NA	NA	75.0%

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

Objective 5: The Departments of Health and Human Service, Aging and Disability Resource Center, and Veteran Services will explore organizational and service efficiencies, enhancements, and alignments that might be achieved as a result of their co-location in the Human Services Center. The departments will report their recommendations and findings to the County Executive in the second quarter of 2009, for consideration in developing the 2010 budget.

Aging & Disability Resource Center Program

Aging & Disability Resource Center Fund

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.

	2007 Actual	2008 Budget	2008 Estimate	2009 Budget	Budget Change
Staffing (FTE)	0.00	10.22	10.22	22.26	12.04
General Government	\$0	\$1,384,445	\$1,304,490	\$3,151,016	\$1,766,571
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	\$0	\$1,384,445	\$1,304,490	\$3,151,016	\$1,766,571
Personnel Costs	\$0	\$821,862	\$799,068	\$1,911,098	\$1,089,236
Operating Expenses	\$0	\$436,032	\$384,637	\$814,301	\$378,269
Interdept. Charges	\$0	\$126,551	\$120,785	\$425,617	\$299,066
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$0	\$1,384,445	\$1,304,490	\$3,151,016	\$1,766,571

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

General Government revenues increase by \$1,766,571 is due to the first full year expenditure cost reimbursements from Aging and Disability Resource Center (ADRC) State grant funding, which opened April 1, 2008.

Personnel costs increase of \$1,089,236 reflects a full year of operation for the 22.26 FTE allocated to the ADRC in 2009, including the full integration of staffing shifted over from the Waukesha County Department of Health and Human Services Long Term Care Division.

Operating expenses increase is mainly due to a \$365,106 increase in contracted ADRC Specialist services from \$246,818 to \$611,924; \$51,334 in increased mileage reimbursement; \$10,000 in increased promotional supplies; and \$8,603 increase in other operating expenses. Increases are partially offset by decreases of \$20,133 in miscellaneous supplies; \$20,097 in miscellaneous operating expenses; \$12,070 in software maintenance costs to \$17,820; and \$4,474 in various other operating expenses.

Interdepartmental charges increase is mainly due to a \$233,072 increase in County indirect administrative cost recoveries to \$253,072; \$53,145 in allocated computer maintenance charges; \$18,215 in insurance charges; \$14,449 of telephone charges; and \$13,144 for postage costs. Increases are partially offset by a decrease of \$39,000 in data processing charges to \$10,000.



Activity

The ADRC has planned a variety of activities to provide customers with 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 is 50% of a full year's activity based on July 1, 2008 start-up date for Managed Care Organizations (MCOs).

	2006 Act	2007 Act	2008 Est.	2009 Proj.
Information & Assistance Contacts	NA	NA	10,700	21,400
Long-Term Care Options Counseling Contacts	NA	NA	2,620	5,240
Functional Screens Performed	NA	NA	485	970

Aging & Disability Resource Center Program

Aging & Disability Resource Center Fund

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.

	2007 Actual (a)	2008 Budget	2008 Estimate	2009 Budget	Budget Change
Staffing (FTE)	1.31	1.80	1.80	2.00	0.20
General Government	\$70,974	\$170,505	\$165,934	\$174,482	\$3,977
Other Revenue - Donations	\$100	\$200	\$200	\$200	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
County Tax Levy	\$54,238	\$102,283	\$102,283	\$114,328	\$12,045
Total Revenues	\$125,312	\$272,988	\$268,417	\$289,010	\$16,022
Personnel Costs	\$98,899	\$134,520	\$129,307	\$145,815	\$11,295
Operating Expenses	\$3,373	\$127,511	\$124,141	\$130,425	\$2,914
Interdept. Charges	\$6,243	\$10,957	\$10,852	\$12,770	\$1,813
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$108,515	\$272,988	\$264,300	\$289,010	\$16,022

Rev. Over (Under) Exp.	\$16,797	-	\$4,117	-	-
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(a) Restated from the Senior Services General Fund.



Program Highlights

Increase in General Government revenues of \$3,977 is due to an increase of \$3,977 in Aging and Disability Resource Center (ADRC) State grant funding to \$123,737. Also, State grant Elderly Benefit Specialist funding remains unchanged at \$33,438. In addition, Title IIIB Supportive Services grant funding for the Elderly Benefit Specialist remains unchanged at \$17,307. Property Tax Levy in this program increases by \$12,045 to \$114,328 due to higher personnel costs and operating expenses.

Personnel costs increase \$11,295 due to a 0.25 FTE increase based on full year staffing in 2009, partially offset by a \$4,000 or 0.05 FTE decrease in projected overtime costs.

Operating expenses include normal operational needs for the program. Increased expenses include \$4,228 in mileage reimbursements for two Elderly Benefit Specialists and two Contracted Disability Benefit Specialists; \$1,440 in software maintenance; \$1,000 in publications; and \$967 in office supplies. Operating expense increases are partially offset by decreases of \$5,055 in computer charges, telecommunication equipment, and office equipment. Also, operating expenses includes \$105,229 for two contracted Disability Benefit Specialists in the 2009 Budget.

Interdepartmental charges increase of \$1,813 is mainly due to \$661 in postage charges; \$551 in telephone charges.

Activity

Elderly benefits counseling activity was available for a full year in 2008. Disability benefits counseling began on May 1, 2008. Start-up for the disability benefits counseling in 2008 is 50% of a full year's activity. As part of the ADRC, Benefit Specialist activity is measured by number of contacts beginning in 2008.

	2007 Act	2008 Est.	2009 Proj.
Elderly Benefits Counseling Contacts	NA	1,234	2,468
Disability Benefits Counseling Contacts	NA	677	1,354
Standard Elderly Benefit Cases			
Number of Cases	502	NA	NA
Number of Clients	271	NA	NA
Presentation Attendees	106	NA	NA
Monetary Impact of Benefits	\$1,685,259	NA	NA

Aging & Disability Resource Center Program

Aging & Disability Resource Center Fund

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.

	2007 Actual (a)	2008 Budget	2008 Estimate	2009 Budget	Budget Change
Staffing (FTE)	3.82	2.59	2.57	2.51	(0.08)
General Government	\$101,263	\$127,587	\$116,289	\$120,940	(\$6,647)
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	\$190,591	\$86,065	\$86,065	\$88,746	\$2,681
Total Revenues	\$291,854	\$213,652	\$202,354	\$209,686	(\$3,966)
Personnel Costs	\$225,652	\$147,991	\$139,689	\$144,865	(\$3,126)
Operating Expenses	\$43,258	\$52,381	\$45,890	\$48,513	(\$3,868)
Interdept. Charges	\$14,944	\$13,280	\$12,028	\$16,308	\$3,028
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$283,854	\$213,652	\$197,607	\$209,686	(\$3,966)

Rev. Over (Under) Exp.	\$8,000	-	\$4,747	-	-
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(a) Restated from the Senior Services General Fund.



Program Highlights

General Government revenue decreases due to reduction in program allocation of Federal Older Americans Act Title IIIB Supportive Services funding of \$3,145 from \$60,660 to \$57,515, and Title IIIE Family Caregiver funding of \$3,502 from \$66,927 to \$63,425. Property Tax Levy in the program increases by \$2,681 to \$88,746 to offset lower General Government revenues.

Total expenditures overall decrease of \$3,966 includes an interdepartmental charge increase due primarily to an increase of \$4,607 in End User Technology Computer Maintenance charges assigned to the department from \$3,721 to \$8,328, partially offset by decreases of \$1,876 in postage charges from \$7,338 to \$5,462, and a net increase of \$297 in other interdepartmental charges.

Personnel costs decrease is due primarily to shifting a 0.05 FTE of position to the ADRC program, and a reduction of \$2,000 or 0.03 FTE in overtime costs. Operating expenses decrease is due to reductions of \$2,308 in outside printing, and \$2,065 in travel and training costs.

Activity

A variety of activities meet the needs of older adults and caregivers.



	2007 Act	2008 Est.	2009 Proj.
Caregiver Library Items Used	2,215	2,311	2,815
Newsletter Distribution	2,561	3,496	4,496
Senior Sources Distribution	8,333	9,000	9,000
Presentation/Display Audience	1,556	1,100	1,210

Aging & Disability Resource Center Program

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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.

	2007 Actual (a)	2008 Budget	2008 Estimate	2009 Budget	Budget Change
Staffing (FTE)	1.53	0.85	0.83	0.82	(0.03)
General Government	\$33,475	\$29,104	\$26,514	\$27,982	(\$1,122)
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/(Credit)	\$103,020	\$61,605	\$61,605	\$53,000	(\$8,605)
Total Revenues	\$136,495	\$90,709	\$88,119	\$80,982	(\$9,727)
Personnel Costs	\$94,653	\$68,621	\$63,949	\$65,836	(\$2,785)
Operating Expenses	\$11,275	\$16,201	\$14,902	\$9,277	(\$6,924)
Interdept. Charges	\$8,528	\$5,887	\$7,483	\$5,869	(\$18)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$114,456	\$90,709	\$86,334	\$80,982	(\$9,727)

Rev. Over (Under) Exp.	\$22,039	-	\$1,785	-	-
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(a) Restated from the Senior Services General Fund.



Program Highlights

General Government revenue decrease is due to a reduction in program allocation of Federal Older Americans Act Title III E Family Caregiver funding of \$1,920 from \$8,894 to \$6,974, offset by an increase in Federal Older Americans Act Title III B Supportive Services funding of \$798 from \$20,210 to \$21,008. Property Tax Levy decreases by \$8,605 in this program to \$53,000 and is shifted to other ADRC Fund programs.

Personnel costs decrease is due primarily to a reduction of 0.03 FTE in overtime costs.

Operating expenses decrease mostly due to a reduction of \$6,920 in computer software maintenance costs.

Interdepartmental charges overall decrease of \$18 includes an increase of \$1,547 in telephone and cellular phone charges, offset by decreases of \$1,054 in End User Technology Computer Maintenance and support charges allocated to this program, and \$474 in computer replacement 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.

Number of People Receiving Case Management Service			
	2007 Act.	2008 Est.	2009 Proj.
Multiple issues contacts	958	975	984
Single issue assessment contacts	358	300	300
Counseling session only	85	70	75
Total	1,401	1,345	1,359