

CHIPPEWA COUNTY

ADRC (AGING & DISABILITY RESOURCE CENTER) BOARD

REGULAR MEETING

JULY 20, 2023

CHIPPEWA COUNTY COURTHOUSE, RM 119Q

4:45 PM

1. CALL TO ORDER

The meeting was called to order at 4:45 p.m. by Chair Kari Ives.

2. ROLL CALL

Attendee Name	Organization	Title	Status	Arrived
Kari Ives	Chippewa County	District 21 (Chair)	Present	
Patricia German	Chippewa County	Citizen Rep (Vice-Chair)	Present	
Larry Marquardt	Chippewa County	Citizen Rep	Present	
Don Hauser	Chippewa County	Citizen Rep	Present	
Mary Frasier	Chippewa County	Citizen Rep	Present	
Cindy Spaeth	Chippewa County	Citizen Rep	Present	
Glen Howell	Chippewa County	Citizen Rep	Absent	

Others Present: Leslie Fijalkiewicz, ADRC Manager; Tim Easker, Human Services Director; Pauline Spiegel, Administrative Assistant; Paul Brenner, Senior Fiscal Manager; ADRC Staff: Sarah Hedlund, Carrie Schick, Sue Koepnick

3. MEMBERS OF THE PUBLIC WISHING TO BE HEARD

There were no members of the public wishing to be heard.

4. CONSENT AGENDA

The consent agenda was approved with a change of the next meeting date to Sept 7, 2023, 4:45 p.m. in Room 119Q.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	Patricia German, Citizen Rep (Vice-Chair)
SECONDER:	Don Hauser, Citizen Rep
AYES:	Ives, German, Marquardt, Hauser, Frasier, Spaeth
ABSENT:	Howell

1. Approve the agenda

2. Approve the Minutes

ADRC (Aging & Disability Resource Center) Board - Regular Meeting - May 11, 2023 4:45 PM

3. Schedule next meeting date - September 14, 2023

5. REPORTS

ADRC (Aging & Disability Resource Center) Board

Minutes
Regular Meeting

Chippewa County Courthouse, Rm 119Q

July 20, 2023
4:45 PM

1. **Senior Farmers Market Voucher Program - Carrie Schick**
ADRC Administrative Assistant Carrie Schick presented information on the Senior Farmers Market voucher process. Individuals complete a very simple application (either online or in the office). The applications are then reviewed. If completing applications in person, vouchers given out then. If online, folks will be notified to stop in and pick up. The program started June 1 and all the vouchers have been distributed, so a waitlist has been developed in the hope we can get more. If not, the waitlist folks will be first on the list for next year. Carrie enjoys coordinating this program. It is a good way to get people out in community (to a local event) and obtain fresh produce. The vouchers can be used at most Wisconsin farmers markets.
2. **ADRC Manager Report - Leslie Fijalkiewicz**
ADRC Manager Leslie Fijalkiewicz presented the ADRC Manager Report. She highlighted several items from her report: Independent Living Support Program, data comparison of calls and contacts, customers, meals, walk-ins; State budget update, Day in the Life event, and fiscal information through June 2023. She also reported a site aide for Bloomer area has been hired, but the site aide for Cadott is resigning.
3. **ADRC Advocacy Report - Leslie Fijalkiewicz**
ADRC Manager Leslie Fijalkiewicz shared current advocacy information that included proposed changes within the Older Americans Act. Advocates are invited to review and provide input. Leslie will be doing so and invites board members to do the same.

6. BUSINESS ITEMS

1. **ADRC 2024 Fees and Donations - Leslie Fijalkiewicz**
The recommendation for no changes to the fees and donations for the 2024 ADRC budget were reviewed and approved. A suggestion to communicate to consumers why fees are not increasing for 2024 but likely will in future years (remaining ARPA funds that will be used by September 2024). Leslie will write an article for the Bridging Chippewa County publication and will also post on ADRC's Facebook page.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	Patricia German, Citizen Rep (Vice-Chair)
SECONDER:	Don Hauser, Citizen Rep
AYES:	Ives, German, Marquardt, Hauser, Frasier, Spaeth
ABSENT:	Howell

2. **ADRC 2024 Budget - Leslie Fijalkiewicz/Paul Brenner**
The 2024 ADRC budget was reviewed and approved to forward to the County Administrator as part of the overall Human Services 2024 budget.

RESULT:	FORWARD BUDGET TO THE COUNTY ADMINISTRATOR [UNANIMOUS]
MOVER:	Don Hauser, Citizen Rep
SECONDER:	Mary Frasier, Citizen Rep
AYES:	Ives, German, Marquardt, Hauser, Frasier, Spaeth
ABSENT:	Howell

7. AGENDA ITEMS FOR FUTURE CONSIDERATION

ADRC (Aging & Disability Resource Center) Board

Minutes

July 20, 2023

Regular Meeting

Chippewa County Courthouse, Rm 119Q

4:45 PM

8. ADJOURN

Meeting adjourned at 5:51 p.m.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	Patricia German, Citizen Rep (Vice-Chair)
SECONDER:	Cindy Spaeth, Citizen Rep
AYES:	Ives, German, Marquardt, Hauser, Frasier, Spaeth
ABSENT:	Howell

CHIPPEWA COUNTY

ADRC (AGING & DISABILITY RESOURCE CENTER) BOARD

REGULAR MEETING

MAY 11, 2023

CHIPPEWA COUNTY COURTHOUSE, RM 302

4:45 PM

1. CALL TO ORDER

2. ROLL CALL

Attendee Name	Organization	Title	Status	Arrived
Kari Ives	Chippewa County	District 21 (Chair)	Late	5:00 PM
Patricia German	Chippewa County	Citizen Rep (Vice-Chair)	Present	
Larry Marquardt	Chippewa County	Citizen Rep	Absent	
Don Hauser	Chippewa County	Citizen Rep	Present	
Mary Frasier	Chippewa County	Citizen Rep	Present	
Cindy Spaeth	Chippewa County	Citizen Rep	Present	
Glen Howell	Chippewa County	Citizen Rep	Present	

Others Present: Leslie Fijalkiewicz, ADRC Manager; Tim Easker, Human Services Director; Pauline Spiegel, Human Services Administrative Assistant

3. MEMBERS OF THE PUBLIC WISHING TO BE HEARD

There were no members of the public wishing to be heard.

4. CONSENT AGENDA

RESULT: APPROVED [5 TO 0]
MOVER: Don Hauser, Citizen Rep
SECONDER: Glen Howell, Citizen Rep
AYES: German, Hauser, Frasier, Spaeth, Howell
ABSENT: Marquardt
AWAY: Ives

1. Approve the agenda

2. Approve the Minutes

ADRC (Aging & Disability Resource Center) Board - Regular Meeting - Mar 9, 2023 4:45 PM

3. Schedule next meeting date - July 13, 2023

5. REPORTS

- ADRC Staff Presentation - Options Counseling - Erika Stevens
Erika was not able to be present; therefore, she will present at the July meeting.

Minutes Acceptance: Minutes of May 11, 2023 4:45 PM (Consent Agenda)

ADRC (Aging & Disability Resource Center) Board

Minutes

May 11, 2023

Regular Meeting

Chippewa County Courthouse, Rm 302

4:45 PM

2. ADRC Manager Program and Financial Report - Leslie Fijalkiewicz
ADRC Manager Leslie Fijalkiewicz presented the ADRC Manager Report. She highlighted several items from her report: - Status of filling Nutrition Program Site Aide positions, how additional federal Older Americans Act funds impact Chippewa County ADRC programs, Nutrition Program policy updates, mileage reimbursement for volunteer drivers; diversity, equity, and inclusion training; and financial information. She also noted that May is Older Americans Month.
3. ADRC Advocacy Report - Leslie Fijalkiewicz
ADRC Manager Leslie Fijalkiewicz shared current advocacy information that included a review of their trip to Madison for Aging Advocacy Day to meet with legislators regarding the lack of funding in a number of elder programs and services. A list of our area legislators is included in the packet along with an advocacy conversation template to use when speaking with a legislator.

6. BUSINESS ITEMS

1. ADRC Program Prioritization Results - Leslie Fijalkiewicz
The 2023 ADRC program priority rankings as determined by the ADRC Board members were reviewed and approved.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	Don Hauser, Citizen Rep
SECONDER:	Glen Howell, Citizen Rep
AYES:	Ives, German, Hauser, Frasier, Spaeth, Howell
ABSENT:	Marquardt

2. Remove Chippewa County Emergency Protective Placement Policy as an ADRC Policy
Background information was provided, and the Board approved to remove this policy from ADRC oversight as Emergency Protective Placements are no longer provided through the ADRC.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	Don Hauser, Citizen Rep
SECONDER:	Mary Frasier, Citizen Rep
AYES:	Ives, German, Hauser, Frasier, Spaeth, Howell
ABSENT:	Marquardt

7. AGENDA ITEMS FOR FUTURE CONSIDERATION

8. ADJOURN

The meeting adjourned at 5:24 p.m.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	Glen Howell, Citizen Rep
SECONDER:	Mary Frasier, Citizen Rep
AYES:	Ives, German, Hauser, Frasier, Spaeth, Howell
ABSENT:	Marquardt

Minutes Acceptance: Minutes of May 11, 2023 4:45 PM (Consent Agenda)



STATEMENT OF EXPLANATION
SENIOR FARMERS MARKET VOUCHER PROGRAM - CARRIE SCHICK

5.1

Background: Carrie Schick will present information about this program, how it is administered in Chippewa County, and the value of this to the community



**STATEMENT OF EXPLANATION
ADRC MANAGER REPORT - LESLIE FIJALKIEWICZ**

5.2

Background: Manager, Leslie Fijalkiewicz provides updates on agency programs, services, other activities, and fiscal status.



Manager's Report to the ADRC Board Leslie Fijalkiewicz



Board Meeting Date: July, 2023

1. Staffing

No changes in staffing though we continue to work on recruitment for a 6-9 hour per week Nutrition Program Site Aide position in Bloomer.

2. Older Americans Act funding

The last substantial update to the Older Americans Act regulations was in 1988...35 years ago! Since that time the population of older adults has nearly doubled, and it has grown increasingly diverse. People are living longer and their expectations are different from those of earlier generations. The Administration for Community Living (ACL) is seeking input on proposed updates to the regulations for the Older Americans Act. Comments must be received by 11:59 pm ET on August 15, 2023.

3. Stepping On coming to Chippewa County!

We are partnering with Mayo clinic to bring Stepping On classes to Chippewa County. We will be taking the registrations and Mayo will have two trained staff lead the workshops starting October 4, 2023. This 7-week series will be offered in Chippewa Falls with hopes of expanding this to other communities in the spring.

4. Independent Living Support Pilot

Dunn County has hired two people to support this grant which will serve Dunn, Chippewa and Eau Claire Counties. There has been a short delay in beginning enrollments and we also expect that initial enrollments will take longer as the two new hires get acclimated to their new role. The intent of this grant is to delay or prevent the need for the more expensive FamilyCare and IRIS programs. It is also a great option for folks who just need one-time assistance, such as purchasing some technology or equipment to facilitate independence without having estate recovery.

5. Data comparisons – see chart below. Leslie to provide explanations for differences

6. State Budget update

Governor Evers signed the 2024-2025 biennial budget on 6/5/2023. The budget includes funds for home delivered meals, Alzheimer's Family Caregiver Support Program, Adult Protective Services, and ADRC base allocation! Our "asks" were big and while we didn't get what we asked for, we did get some HUGE wins for the people we serve. Much to celebrate for sure!

7. Day In The Life

Be sure to sign up for this event that provides board members with an opportunity to learn more about DHS as a whole and some of the individual programs provided by the department. Tentative ADRC opportunities include choosing a Medicare D plan, receiving a baseline memory screen, completing a Power of Attorney for Healthcare, and options counseling "Age in Place."

Data Units Being Compared (Jan thru May)	2022	2023
Calls re: Resources for Homeless/Risk of Homelessness	11	25
Contacts per Customer	3.39	2.93
Total Nutrition Program Customers / Meals	300 / 15,813	372 / 16,008
Total Calls / Total Unduplicated Callers	3,019 / 891	2,257 / 771
Total Outgoing Calls / Walk – In Calls or Appointments	1,244 / 75	742 / 121

Fiscal Report to ADRC Board
Though June 2023
(50% of year)

Program/Grants	Budgeted Amount	Expenses	Revenue	Remaining Budget	% Budget Expended
ADRC Grants (includes Dementia Care Specialist)	\$1,051,417	\$455,275	\$455,275	\$596,142	43%
Nutrition Program (grants & donations)	538,639	193,494	193,494	345,145	37%
Transportation (85.21 grant, levy, donations)	214,844	83,120	214,844	131,724	39%
Other Grants	165,339	70,820	70,820	94,519	43%
TOTALS	\$1,970,239	\$802,709	\$934,433	\$1,167,530	41%

ARPA Grants Available	\$136,406
ARPA Included in Nutrition Budget	55,877
ARPA Included is Other Grants**	15,500
Unbudgeted ARPA Funds	64,929

** = Housekeeping / homemaker services \$10,000 Caregiver support \$5,500

Independent Living Supports Pilot Program

Empowering Wisconsin Residents

The Independent Living Supports Pilot program provides short-term, flexible, and limited services to help Wisconsin residents at risk of entering Medicaid long-term care.



**Live Life
on
Your Terms**

What can I get?

- Specialized medical equipment
- Assistive technology
- Home modifications
- Caregiver training
- And more!

Who can enroll?

- Over 18 years old
- Not enrolled in Medicaid long-term care programs
- WI resident living in a pilot ADRC agency service area
- Persons with qualifying disabilities

Contact your
ADRC **now!**

Call
Email
Visit
Stop by

Visit dhs.wi.gov/ilsp for more details.



WISCONSIN DEPARTMENT
of HEALTH SERVICES

P-03471

Packet Pg. 10



STATEMENT OF EXPLANATION
ADRC ADVOCACY REPORT - LESLIE FIJAKLIEWICZ

5.3

Background: The ADRC is required to advocate on behalf of and empower our consumers to be their own advocates. Per the state contract for ADRCs, the governing board role includes: “Be an advocate for older adults and adults with physical or intellectual/developmental disabilities in the ADRC service area.” This report identifies issues that relate to our consumers. The report is not all inclusive but will address federal, state, and local concerns.

Advocacy Update July 2023

ACL Seeks Input on Updates to Older Americans Act Program Regulations

The Administration for Community Living (ACL) is seeking input on proposed updates to regulations for the Older Americans Act (OAA) programs. The last substantial update to most OAA program regulations was in 1988. The population of older adults has nearly doubled since that time and has grown increasingly diverse. Additionally, new programs have been added to the OAA and current regulations don't reflect these programs. Older adults are also living longer and their expectations are different from those of earlier generations.

In preparation for developing the proposed updates, ACL solicited input from stakeholders through a series of listening sessions and a Request for Information (RFI) that closed last June.

ACL states the proposed rule addresses issues that have emerged since the last update, clarifies a number of requirements, and aligns regulations to the current statute. The Notice of Proposed Rulemaking (NPRM) relates to OAA programs authorized under Title III (grants to states and community programs on aging), Title VI (grants to Indian tribes and Native Hawaiian grantees), and Title VII (allotments for vulnerably elder rights protection activities). Programs addressed include the Long-Term Care Ombudsman Program, Elder Abuse Prevention, Legal Services, Family Caregivers, and the Senior Nutrition Program.

Comments must be received by 11:59 pm ET on August 15, 2023.

FY 2024 Older Americans Act (OAA) Funding & the Debt Ceiling Bill

In late May, the White House and House Republican Leadership reached an agreement to address the debt limit and cap federal spending. This debt ceiling agreement, titled the **Fiscal Responsibility Act of 2023** (FRA) ([H.R. 3746](#)), will suspend the debt ceiling through January 1, 2025. The Congressional Budget Office indicated the FRA will reduce the deficit by \$1.5 trillion over the next 10 years.

Despite opposition from some conservatives and progressives, the House passed the bill on May 31 by an overwhelming bipartisan vote (314-117). On June 1, the Senate adopted the bill by a bipartisan vote of 63 to 36 and immediately sent the bill to the President's desk. The President signed the bill into law on Sat., June 3 just days before Treasury Secretary Janet Yellen indicated the federal government would no longer have the capacity to pay its debts (June 5).

Among other things, the FRA:

- **Caps non-defense discretionary (NDD) spending (which includes the Older Americans Act and other social service program) for Fiscal Year (FY) 2024 and 2025 at approximately 9% less than FY 2023 enacted levels and allows for 1% growth from 2024-2025. Though the bill limits discretionary spending, it does not mandate spending limits for mandatory spending (i.e., Medicare and Medicaid).**

- **Includes policy changes to the Supplemental Nutrition Assistance Program (SNAP or FoodShare in Wis.).** In addition to meeting income eligibility requirements, SNAP participants must also fulfill general work requirements unless they fall into an exempt category. Under current law, able bodied adults without dependents (ABAWDs)—individuals under 50 who are deemed work-eligible and not living with children—cannot receive SNAP benefits for more than three months within a 36-month period unless they participate in a work or attend a training program for at least 20 hours per week. States are allowed to annually exempt up to 12% of ABAWDs not otherwise exempt from the SNAP time limit. **The FRA expands the ABAWD time limit to include adults ages 50-54, phasing the age-limit increase in by FY 2025** (adults ages 50-52 in FY 2024 & adults up to age 54 in FY 2025) **and keeping it in place until FY 2030.** The FRA exempts homeless individuals, veterans, and youth aging out of foster care from the ABAWD time limit during this same period. Additionally, the FRA permanently reduces allowable state ABAWD exemptions from 12 to 8%.
- **Rescinds \$28 billion in unobligated federal COVID-19 related funding** (this does not include any rescissions of unobligated American Rescue Plan Act (ARPA) funds for Older Americans Act, Adult Protective Services, or Medicaid Home and Community-Based Services (HCBS), as these funds have already been obligated to states. State and Local Fiscal Recovery Fund (SLFRF) dollars are also not included in the rescissions.

With much of the NDD funding capped for the next two years, and factoring in inflation and population growth, Congress will have less money to spend on key federal government programs including the OAA and other aging, disability, housing, transportation, human services, and health-related programs and services. This means OAA advocates will be fighting for slices of a smaller pie for the next two years. **We can still secure funding increases, but we will need to work much harder given the limits Congress has set on how much it can spend.**

Proposed Rule:

Update to ACL's Older Americans Act Regulations

An overview for ACL's networks

The Administration for Community Living is seeking input on proposed updates to the regulations for its Older Americans Act (OAA) programs. Comments must be received (or postmarked) by 11:59 p.m. on August 15 2023. (Instructions for submitting comments and registering for an informational webinar can be found on [ACL.gov](https://acl.gov) and at the end of this overview.)

Summary

The last substantial update to most OAA program regulations was in 1988, and our world has changed dramatically in the 35 years since. The population of older adults has nearly doubled, and older adults are living longer than ever before. Their expectations for aging are different from those of earlier generations. Increased understanding of the impact of the social determinants of health is reshaping health care, as non-medical services that help people avoid hospitalization and institutional care – like those provided through OAA programs – are increasingly being incorporated into health care service delivery models. In addition, the OAA has been amended by Congress seven times since 1988.

One important thing has not changed: older adults overwhelmingly want to continue to live independently, in the community – and nearly 95 percent of them do.

Updates are needed to align regulations to the current statute and reflect the needs of today's older adults. The proposed rule addresses issues that have emerged since the last update and clarifies a number of requirements. It aims to better support the national aging network that delivers OAA services and improve program implementation, with the ultimate goal of better serving older adults. For example, the proposed rule:

- Clarifies requirements for state and area plans on aging and details requirements for coordination among tribal, state and local programs.
- Improves consistency of definitions and operations between state and tribal OAA programs.

- Clarifies and strengthens provisions for meeting OAA requirements for prioritizing people with the greatest social and economic needs.
- Specifies the broad range of people who can receive services, how funds can be used, fiscal requirements and other requirements that apply across programs.
- Clarifies required state and local policies and procedures. For example, the proposed rule establishes expectations regarding conflicts of interest.
- Incorporates guidance for the National Family Caregiver Support Program and the Native American Caregiver Support Program, which were authorized since the last update to the OAA regulations.
- Addresses emergency preparedness and response, incorporating lessons from the COVID-19 pandemic.
- Establishes expectations for legal assistance and activities to prevent elder abuse.
- Clarifies the role of the aging network in defending against the imposition of guardianship and in promoting alternatives.
- Updates definitions, modernizes requirements and clarifies flexibilities within the senior nutrition programs. For example, ACL proposes provisions that would allow for continuation of innovations utilized during the COVID-19 pandemic, such as carry-out meals provided under the congregate meals program in some circumstances.

The proposed rule is the culmination of many years of engagement with the national aging network. It also reflects input received through [a formal request for information](#) and a series of listening sessions, including formal tribal consultations and other engagement with Native American grantees.

ACL seeks feedback on the proposed rule from all who are interested in improving implementation of OAA programs and services. Input from the aging and disability networks and the people served by OAA programs is particularly crucial. Comments are welcome on any part of the proposed rule, but ACL also has asked specific questions in several key areas in which input is particularly needed.

Background on the Older Americans Act:

First passed in 1965 and last reauthorized on March 25, 2020, [the OAA](#) authorizes a wide range of programs and services that help older adults age in place. Through the aging services network, the OAA has helped older adults remain active and engaged in their communities to the great benefit of all. Because of the OAA, communities across the country are able to continue to draw upon the wealth of knowledge that comes only with life experience.

The services authorized by the OAA include:

- Home-delivered and congregate meals, support for family caregivers, preventive health services, personal and home care services, transportation, legal assistance, elder abuse prevention, and more (authorized under Title III - Grants for state and community programs on aging).
- Home and community-based services for Native American elders and caregivers (authorized under Title VI - Grants to Indian tribes and Native Hawaiian grantees for supportive, nutrition, and caregiver services).
- Ombudsman services for people who live in long-term care facilities, funding for prevention of elder abuse, and other elder rights programs (authorized under Title VII - Allotments for vulnerable elder rights protection activities).

ACL administers these provisions through its Administration on Aging. (The Department of Labor administers Title V of the OAA, the Senior Community Services Employment Program. It is not covered by ACL's proposed rule.)

Key Provisions of the Proposed Rule

Following is a brief overview of some of the key provisions of the proposed rule. Please note that this was written in more plain language, with a goal of being easier to understand for people who may not have an in-depth understanding of a given provision of the OAA. In addition, this overview includes only some of the highlights of the proposed rule; it does not include all of the provisions or complete details of the summarized provisions. Please use this document as a tool to help navigate the proposed rule; it should NOT be considered a substitute.

Roles and Responsibilities of State Agencies and Area Agencies on Aging:

The OAA authorizes grants to state agencies, which in turn provide funding to area agencies on aging (AAAs) to coordinate programs and advocate for older adults and family caregivers. State agencies and AAAs have both emphasized a need for additional guidance on a number of issues, including fiscal requirements, service delivery and avoiding conflicts of interest. To address those issues (and others), if finalized, the proposed rule would

- Clarify requirements for state and area plans on aging. For example, the proposed rule would make clear that plans must describe:
 - How state agencies and AAAs will use OAA funding, how “greatest economic need” and “greatest social need” are determined and addressed, and how requirements for public participation are met (§ 1321.27 and § 1321.65).
 - How state agencies and AAAs will ensure coordination between programs that serve all older adults, including tribal elders (authorized under Title III) and those that specifically focus on tribal elders (authorized under Title VI) (§ 1321.53, § 1321.69, and § 1321.95).
- List requirements for designation of planning and service areas and area agencies on aging (§ 1321.13, § 1321.15, § 1321.17, § 1321.19, § 1321.21, and § 1321.23).
- Clarify the state agency's responsibility to establish and maintain policies and procedures to monitor the programmatic and fiscal performance of programs and activities carried out under Title III of the OAA and to ensure that its own – and its AAAs' – policies and procedures are aligned with ACL's data collection and reporting requirements (§ 1321.9(a) and (b)).

- Clarify policies and procedures that AAAs and service providers must follow, including setting requirements for client eligibility, assessment, and person-centered planning and detailing limitations on the frequency, amount, or type of service provided (§ 1321.9(c)(1)).
- List and clarify the policies and procedures that state agencies must establish and maintain regarding fiscal requirements, including distribution of Title III funds; non-federal share (match) requirements; permitted transfers; reallocation of funds; use of program income; private pay programs; contracts and commercial relationships; buildings, alterations or renovations, maintenance, and equipment; and advance funding (1321.9(c)(2)).
- Require state agencies to establish flexible and streamlined processes for AAAs to receive approval for contracts and commercial relationships. This provision is proposed in response to numerous questions about the appropriate roles, responsibilities, and oversight of such activities, feedback received in response to the RFI, and based on our observations of program activities. The provision is intended to promote and expand the ability of the aging network to engage in business activities while ensuring that the unique roles of OAA grantees are preserved. ACL specifically seeks comment on whether our proposed approach appropriately balances the need for clear policies and procedures with the need to have a workable approval process (§ 1321.9(c)(2)(xiv)).
- Define “conflicts of interest” and establish several requirements to prevent them. The scope of activities of entities that receive OAA funding has changed significantly since the last update to the OAA regulations, and the potential for conflicts of interest have increased. These provisions are intended to ensure the integrity of – and trust in – the activities carried out under the OAA. (§ 1321.3, § 1321.47, § 1321.67, and § 1321.73).

Serving Older Adults, Tribal Elders, and Family Caregivers with the Greatest Economic and Greatest Social Need:

Prioritizing people who have the greatest economic and social needs is one of the basic tenets of the OAA (OAA Section 305 (a)(2)(E)). The proposed rule clarifies requirements for states’ definitions of both needs, as well as expectations for serving those who meet them. It also clarifies expectations for ensuring that the perspectives of older people with the greatest economic and social

needs are incorporated into planning efforts. For example, if finalized, the proposed rule would:

- Establish standard expectations for what state agencies and AAAs must include in their definitions of greatest economic and greatest social need, while allowing state agencies and/or AAAs flexibility to include additional populations based upon local considerations. ACL is specifically seeking comment on whether this approach sufficiently identifies requirements while also offering appropriate flexibility (§ 1321.27 and § 1321.65).
- Require state and area plans to include how they will target funding to reach populations they have defined as having the greatest economic and/or social need. State agencies and AAAs must also see and consider the views of people with the greatest economic and greatest social need when developing and administering their plans (§ 1321.27, § 1321.29, § 1321.49, § 1321.51, and § 1321.65).
- Require at least half of AAA advisory council members to be 60 years or older. These must include people from minority populations, and AAAs must make efforts to include people identified as having the greatest economic and greatest social need. Councils also must include family caregivers, and, when available, representatives of tribes, pueblos, and tribal aging programs (§ 1321.63).
- Require service providers to specify how they will satisfy the service needs of those identified as in the greatest economic or greatest social need (§ 1321.83).

Family Caregivers:

Family caregivers make it possible for millions of older adults to remain in their homes in the community. The provisions of the OAA that authorize ACL’s primary caregiver support programs – the National Family Caregiver Support Program and the Native American Caregiver Support Program, which together provide crucial services to nearly 800,000 caregivers – were authorized *after* the last substantial update to the OAA regulations. Consequently, regulations for these programs do not exist.

The proposed rule provides key definitions, implements statutory mandates and clarifies requirements for family caregiver support services, allowable uses of funds, and the method of funds distribution. For example, if finalized the proposed rule would:

- Codify the definitions of “family caregiver” and “older relative caregiver” that have been used since the programs were established in 2000. Specifically:
 - » The term “family caregiver” includes unmarried partners, friends, or neighbors who are caring for an older adult or a person of any age with Alzheimer’s disease or a related disorder with neurological and organic brain dysfunction (§ 1321.3).
 - » The term “older relative caregiver” means a person who is at least 55 years old who lives with a child or a person with a disability for whom they are the primary caregiver and to whom they provide informal care. The proposed rule further delineates the specific relationships and circumstances that qualify and clarifies that when the person receiving care is an adult with a disability, the caregiver may be that person’s parent. (§ 1321.3).
 - » Include family caregivers as a service population for state agencies and AAAs (§ 1321.1, 1321.5, and 1321.55).
 - » Clarify allowable uses of funds for community-based family caregiver support services, as well as eligibility requirements for receiving services (§ 1321.91 & § 1322.29).
- » Allowing state agencies to set aside funding to exercise flexibilities related to a major disaster declaration (and specifying requirements for exercising such flexibilities). For example, the proposed rule would allow a state agency to procure items on a statewide level, subject to certain terms and conditions (§ 1321.99 and § 1321.101).
- Create a new section (Section 1322 Subpart Part D—Emergency & Disaster Requirements), which would support services specifically for Native American elders and family caregivers during emergencies and disasters with provisions such as:
 - » Requiring tribal organizations and Hawaiian Native grantees to establish emergency plans; coordinate activities with the state agency and an AAA providing Title III- and VII-funded services within the grantee’s approved service area; and have policies and procedures for how they will communicate and coordinate with external partners (§ 1322.33 and § 1322.37).
 - » Enabling tribal organizations and Hawaiian Native grantees to exercise flexibilities related to a major disaster declaration and specifying requirements for exercising such flexibilities (§ 1322.35).
 - » Enable the Assistant Secretary for Aging to modify emergency and disaster-related provisions set forth in the regulation when a major disaster or public health emergency is declared (§ 1321.105 and § 1322.39).

Emergency Preparedness and Response:

Emergencies and disasters have distinct and disproportionate impacts on older adults and family caregivers, and often create unique challenges for the aging services network. They also can trigger specific flexibilities in OAA programs. However, the current OAA regulations include limited guidance addressing these situations. The proposed rule includes several provisions for emergency preparedness and response, which reflect lessons learned from the COVID-19 pandemic and seek to address feedback received during the pandemic and through the RFI. For example, if finalized, the proposed rule would:

- Create a new section (Section 1321 Subpart E—Emergency & Response), which would support older adults and family caregivers, including those in tribal communities, during emergencies and disasters with provisions such as:
 - » Requiring state agencies and AAAs to establish emergency plans. They also would be required to have policies and procedures in place for communicating and coordinating with Title VI programs within their jurisdictions (§ 1321.97 and § 1321.103).

Nutrition Flexibilities and Modernization:

The congregate and home-delivered meals provided by the OAA Senior Nutrition Programs help to reduce hunger and food insecurity; provide an opportunity for older adults to engage with other people, which is critical to maintaining health and independence; and provide an opportunity to screen older adults for other needs before they become crises. The programs help more than two million older adults continue to live in the community each year.

The COVID-19 pandemic brought to light limitations in current nutrition regulations and highlighted the need for guidance to support innovation and response to emerging needs. ACL is proposing provisions that would modernize nutrition rules, reflect the evolving needs of both grantees and OAA participants, and alleviate uncertainty caused by relying on sub-regulatory guidance. The proposed rule also clarifies requirements for transfers of funds between programs. For example, if finalized, the nutrition services-related provisions of the proposed rule would:

- Clarify that home-delivered meals may be provided via home delivery, pick-up, carry-out, or drive-through; that eligibility for home-delivered meals is not limited to people who are “homebound;” that eligibility criteria may depend upon many factors; and that home-delivered meal participants may also be encouraged to participate in congregate meals programs (§ 1321.87 and § 1322.27).
- Allow for a limited number of “carry-out” and similar meals to be provided through the congregate meals program, in some circumstances. (§ 1321.87).
- Specify that nutrition education, nutrition counseling, and other nutrition services may be provided as part of both the congregate meals program and the home-delivered meals program (§ 1321.87 and § 1322.27).
- Clarify that Nutrition Services Incentive Program funds may only be used to purchase domestically produced foods used in a meal (§ 1321.87 and § 1322.27).

Services for Native Americans Elders and Caregivers:

American Indians, Alaskan Natives, and Native Hawaiians (AI/AN/NH) have long experienced disproportionate poverty, barriers in accessing health care and related services, unequal education and employment opportunities, and cultural differences that have resulted in health disparities and lower life expectancy. Title VI of the OAA authorizes grants that provide nutrition and supportive services to AI/AN/NH elders to help them to live full, engaged lives in their communities.

The proposed rule clarifies what qualifies as a Title VI service; requirements for collaboration and coordination between programs for all older adults (authorized under Title III) and those specifically focused on tribal populations (Title VI programs); and allowable caregiver support services. It also addresses a need for technical assistance. For example, if approved, the proposed rule would:

- Combine sections 1322 and 1323 and incorporate requirements specific to Title VI part B, to reduce confusion and improve consistency in service provision to both AI/AN/NH elders and family caregivers (§ 1322).
- Establish expectations that tribal organizations and Native Hawaiian grantees coordinate with state agencies and AAAs regarding provision of services. The proposed rule also would explicitly incorporate requirements for coordination between Title III grantees and Title VI grantees into each applicable section of the regulations (§ 1321 & § 1322).

- Specify that applications for Title VI funds must include program objectives; a map and/or description of the geographic boundaries of the service area, which may include Bureau of Indian Affairs service maps; documentation of supportive and nutrition services capabilities; completion of a needs assessment and other assurances; and a tribal resolution, among other requirements (§ 1322.5).
- Specify program and fiscal requirements for which grantees should have established policies and procedures. For example, the rule would require Title VI grantees to have policies and procedures for ensuring that their data collection and reporting align with ACL requirements, voluntary contributions, and buildings and equipment (§ 1322.13).

Elder Abuse Prevention, Legal Assistance, Guardianship, and Long-Term Care Ombudsman Programs:

An estimated one in ten adults over the age of 60 has experienced some form of elder abuse, which may reduce their quality of life and limit their independence. Title VII of the OAA authorizes activities that uphold the rights of older adults and prevent, detect, and respond to elder abuse, neglect, and exploitation. These play a critical role in promoting elder justice, ensuring that older adults can live safely in the community or in long-term care settings, and upholding their right to participate in decisions about their lives. For example, if finalized, the elder rights-related provisions of the proposed rule would:

- Define “defense of guardianship” as advice to, and representation of, people to help them:
 - » Oppose appointment of a guardian; and/or
 - » Seek limitation and/or revocation of guardianship.
- The definition also includes assistance that diverts people from guardianship to less restrictive, more person-directed forms of decisional support whenever possible (§ 1321.93).
- Clarify the role of legal assistance providers as promoters of self-determination and person-directedness. The proposed rule also would require the legal assistance providers meet complex and evolving legal needs involving a range of private, public and governmental entities, programs and activities that may impact an older adult’s independence, choices, or financial security (§ 1321.93).
- Provide standards for selecting legal assistance providers funded under the OAA. For example, the rule would require that legal assistance providers

have demonstrated capacity to represent older adults at both administrative and judicial proceedings (§ 1321.93).

- Clarify that the state agency's obligations to develop policies and procedures extend to elder abuse prevention and legal assistance development programs, and that such programs must be addressed in state plans on aging (§ 1321.9(a) and § 1321.27).
- Provide clarity on the requirements that state agencies must meet with respect to the development and enhancement of programs to address elder abuse, neglect, and exploitation (§ 1324.201).
- Specify the purpose, role, and responsibilities of the legal assistance developer, and prohibit related conflicts of interests, including those related to guardianship (§ 1324.303).
- Add language to require policies and procedures to provide direction for the state long-term care ombudsman and representatives of the office for how to address situations where a resident is unable to communicate consent (§ 1324.11(e)(2) and § 1324.11(e)(3)(iv)).
- Require ombudsman programs to enter into memoranda of understanding with OAA legal assistance programs and licensure and certification entities for facilities and long-term care providers to ensure coordination between these entities. The proposed rule maintains and seeks comments regarding the other potential partners recommended in the 2015 rule, which include organizations in ACL's aging and disability networks (§ 1324.13(h)).

- Clarify prohibitions that preclude state government agencies from interfering with the functions of the Office of the Long-Term Care Ombudsman (§ 1324.11(e)(8)).

Learn more

More information can be found at [ACL.gov](https://acl.gov). In addition, an informational webinar will be held on Thursday, June 22 at 12:30 p.m. (Eastern). For details, please see the [Zoom registration page](#).

How to provide feedback

ACL seeks feedback from all who are interested in improving implementation of OAA programs and services. Input from the aging and disability networks and the people served by OAA programs is particularly crucial.

Starting June 16, comments can be submitted:

- Online at [Regulations.gov](https://www.regulations.gov). (Enter "2023-12829" in the search bar, select ACL's proposed rule, and then click the blue "comment" box at the top left of the page.)
- By email to: OAAregulations@acl.hhs.gov
- By mail to:
Administration for Community Living
Administration on Aging, Attention: ACL-AA17-P
330 C Street SW
Washington, DC 20201

Comments must be received (or postmarked) by 11:59 p.m. (Eastern) on August 15, 2023.



STATEMENT OF EXPLANATION
ADRC 2024 FEES AND DONATIONS - LESLIE FIJALKIEWICZ

6.1

Background: Preparation of the 2024 Budget requires estimating our revenues from fees and donations. Co-pay or Fee is established for Transportation Program. Suggested donations are established for Older Americans Act programs. (These are included in the 2024 budget PowerPoint.)

Action: The recommendation to the board is to keep all 2024 suggested donations and co-pays the same as 2023



STATEMENT OF EXPLANATION
ADRC 2024 BUDGET - LESLIE FIJALKIEWICZ/PAUL BRENNER

6.2

Background: ADRC 2024 Budget is presented by Leslie Fijalkiewicz, Tim Easker and Paul Brenner through Powerpoint and handouts. Challenges and opportunities in the budget are also presented.

Action: The recommendation to the ADRC Board is to approve that the ADRC 2024 budget be forwarded to the County Administrator



Chippewa County Department of Human Services Aging Disability Resource Center

Aging & Disability Resource Center Board
2024 Budget Highlights & Recommendations
Leslie Fijalkiewicz, ADRC Manager



Budget Process

As in previous years we used a combination of zero-base and historical revenues/expenditures.

- Historical figures used were primarily year end 2022
- Year to day 2023 with forecasting
- Estimated unspent ARPA funds

Did not factor in state biennial budget and impact of federal Fiscal Accountability Act



Budget Challenges in 2024

- Uncertainty of Older Americans Act appropriations
- Uncertain how much ARPA funds would remain at the end of 2023
- Limited forecasting available for Senior Dining participation and revenue
- Forecasting food, fuel and paper supplies still difficult
- State biennial budget and uncertain base allocation changes
- 85.21 Transportation grant has decreased past three years while ridership demand has not



Wages & Benefits Comparison

2023	2024
Wages: \$755,303	Wages: \$848,536
Health & Fringe: <u>\$317,995</u>	Health & Fringe: <u>\$341,328</u>
\$1,073,298	\$1,189,864





ADRC Budget Comparison

2024

2018 - \$2,043,640
2019 - \$2,023,393
2020 - \$1,982,626
2021 - \$1,826,630
2022 - \$1,941,971
2023 - \$1,976,701
2024 - \$2,065,589

- Wage study/market analysis led to significant increases in both wages and fringe
- Will be using our ARPA funds in several areas
- Overall budget is up 4.5%



85.21 Transportation Grant

	Grant Amount	% of Eligible WI riders living in Chippewa Co.	% of State Funds distributed to Chippewa County
2023	\$ 166,537	1.18	1.04
2022	\$ 170,982	1.22	1.07
2021	\$ 174,490	1.14	1.09
2020	\$ 175,237	1.15	1.12
2019	\$ 162,015	1.17	1.12
2018	\$ 158,295	1.16	1.12

2024 Revenue & Expenditures

Revenues

- Budgeted at 2023 allocations without regard to possible impacts from state and federal budgets/legislation
- ARPA funds must be used by September 30, 2023
- Conservative program income from participants budgeted for in several areas
- Did not budget for increase in revenue from Family Care and IRIS but we will be increasing those rates

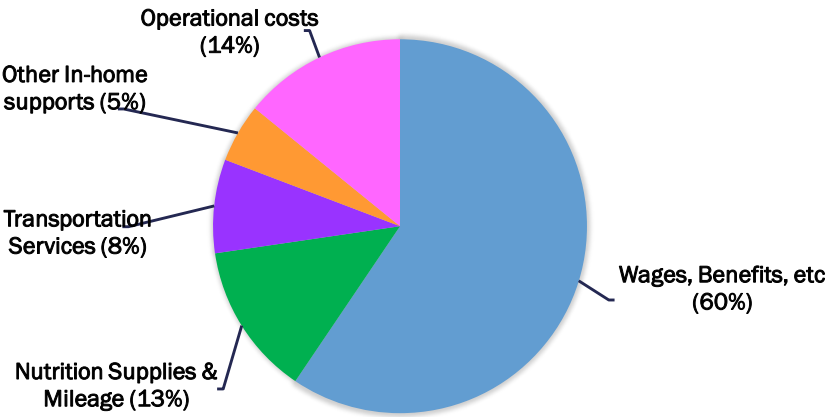


Expenditures

- As previously noted, wages/fringe increased significantly from 2023 to 2024
- Demand for services such as meals, rides and respite services expected to continue increasing
- Still price uncertainty with regard to food, fuel and paper products
- Contracted services likely to continue having an impact (respite, transportation, housekeeping, etc)

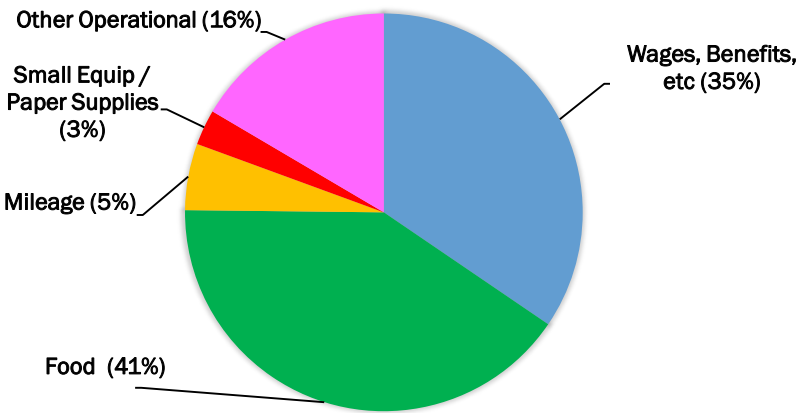


Expenses Related to Overall Budget





Nutrition Program Budget



2024 Fees & Donations

	Current Rate	Recommended 2024 Rate	Fiscal Impact
Senior Dining <i>(suggested donation)</i>	\$ 4.50 / meal	\$4.50 / meal	none
Transportation <i>(fee)</i>	\$ 5.00/one way trip \$10 add-on charge for trips over 100 miles	\$ 5.00/one way trip \$10 add-on charge for trips over 100 miles	none
In-Home Support Program <i>(suggested donation)</i>	\$10 / visit	\$10 / visit	none
NFCSP <i>(suggested donation)</i>	\$10 / visit \$5 supplemental services costs	\$10 / visit \$5 supplemental services costs	none none
Health Living Programs <i>(suggested donation)</i>	\$10 / workshop series	\$10 / workshop series	none

Possible Additional Revenue

- Increase in number of IRIS and Family Care meals as other options become limited for ensuring nutritional health
- Independent Living Support Pilot grant could pay for rides or meals
- State biennial budget which included increases for ADRC, home delivered meals and Alzheimers Family Caregiver grants.



2025 and Beyond

- Continue strengthening our online presence while also improving accessibility to those who don't access information in that manner; partnerships continue to be vital
- Expand outreach to educate people about ways to prevent a crisis and having a plan in place should a crisis occur
- Increase number of people who are willing to share their story for advocacy purposes
- Identify opportunities for improving diversity, equity and inclusion in program planning
- ARPA funds will be gone, federal appropriations uncertain, and new state formula will lead to some significant nutrition program challenges



Extended Budgeting

Budget Summary Justification

User: pbrenner
 Printed: 7/6/2023 - 2:47 PM
 Budget Type: DH Requested
 Revision: 1
 Current Actual YTD: 06/30/23

CHIPPEWA COUNTY

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-70-54600 ADRC Expenditures							
435515	State Aid - ADRC & Aging	380,068.00	423,115.00	454,104.00	106,683.00	454,104.00	460,424.00
435516	State Aid - MA Matching Fundin	337,041.00	308,118.00	370,488.00	40,961.00	370,488.00	350,752.00
435518	State Aid - MFP	26,582.00	1,459.00	0.00	0.00	0.00	0.00
435519	State Aid - MFP MA Match	22,480.00	0.00	0.00	0.00	0.00	0.00
485050	In Kind Contributions	63,376.00	50,857.68	63,376.00	24,990.80	63,376.00	63,376.00
493000	Fund Balance Applied	34,000.00	0.00	39,000.00	0.00	39,000.00	39,000.00
Total revenue without property tax:		863,547.00	783,549.68	926,968.00	172,634.80	926,968.00	913,552.00
411100	General Property Taxes	0.00	0.00	0.00	0.00	0.00	59,892.00
Total revenue with property tax:		863,547.00	783,549.68	926,968.00	172,634.80	926,968.00	973,444.00
511100	Salaries and Wages	460,105.00	428,478.12	508,989.00	221,926.79	508,989.00	555,727.00
511200	Overtime	0.00	77.08	0.00	0.00	0.00	0.00
514100	Per Diem/Mileage - Committee	1,500.00	1,541.85	1,500.00	560.27	1,500.00	1,500.00
515000	Fringe Benefits	85,278.00	75,335.53	94,409.00	40,100.81	94,409.00	102,790.00
515400	Health Insurance Benefit	126,313.00	103,230.78	124,551.00	54,026.42	124,551.00	129,324.00
521200	Contracted Services	0.00	490.49	0.00	191.20	250.00	490.00
521251	Contracted Services-Non Grant	34,000.00	20,724.50	39,000.00	22,257.00	39,000.00	39,000.00
521300	Accounting & Auditing Services	1,400.00	1,469.26	1,200.00	277.50	1,200.00	1,035.00
522300	Cell Phone Costs	4,286.00	3,322.11	2,500.00	1,217.13	2,500.00	3,322.00
522500	Telephone	975.00	761.40	925.00	567.54	925.00	1,170.00
531000	Office Supplies	300.00	722.92	1,200.00	584.18	1,200.00	750.00
531100	Postage	500.00	2,359.62	2,000.00	1,100.05	2,000.00	1,800.00
531200	Copies/Printing	200.00	1,738.76	200.00	1,436.34	400.00	2,000.00
531400	Equipment < \$5,000	2,000.00	467.85	1,100.00	308.43	1,100.00	627.00
531500	Maintenance/Service Agreements	510.00	1,658.89	1,450.00	0.00	1,450.00	1,659.00
531900	Sundry/Miscellaneous	100.00	290.00	50.00	20.00	50.00	100.00
532200	Public Education/Materials	3,500.00	3,171.60	2,500.00	846.25	2,500.00	2,800.00
532400	Memberships & Dues	1,000.00	145.00	750.00	285.00	750.00	700.00
533000	Mileage/Travel	5,000.00	2,640.51	5,000.00	1,592.28	4,500.00	3,500.00

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
533500	Conventions & Meetings	4,400.00	2,986.93	2,750.00	1,145.12	2,750.00	3,200.00
551900	Insurance Allocation	2,630.00	2,767.49	2,400.00	0.00	2,400.00	2,767.00
592999	Transfer Out	0.00	37,657.56	0.00	0.00	0.00	0.00
595200	AMSO Expenditure Transfer	66,174.00	55,807.34	71,118.00	24,773.40	71,118.00	55,807.00
598000	Indirect Cost Allocation	63,376.00	50,857.68	63,376.00	24,990.80	59,978.00	63,376.00
Total expense:		863,547.00	798,703.27	926,968.00	398,206.51	923,520.00	973,444.00
Revenue - Expense:		0.00	-15,153.59	0.00	-225,571.71	3,448.00	0.00

Submitted by:

Department/Division Head

Date

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54601 Congregate							
432001	Federal Aid	0.00	0.00	0.00	0.00	0.00	31,536.00
435515	State Aid - ADRC & Aging	127,987.00	84,907.00	88,470.00	65.00	88,470.00	99,280.00
435517	State Aid - NSIP	15,000.00	1,495.00	3,478.00	0.00	3,478.00	3,478.00
465610	Other Revenues	29,101.00	8,110.50	22,000.00	4,699.50	22,000.00	15,000.00
481000	Interest Income	0.00	0.90	0.00	0.22	4.00	0.00
485050	In Kind Contributions	23,937.00	2,965.25	23,937.00	1,946.30	23,937.00	23,937.00
Total revenue without property tax:		196,025.00	97,478.65	137,885.00	6,711.02	137,889.00	173,231.00
511100	Salaries and Wages	56,390.00	13,813.08	34,852.00	10,653.20	34,852.00	58,587.00
511200	Overtime	0.00	4.29	0.00	0.00	0.00	0.00
515000	Fringe Benefits	10,259.00	2,415.50	6,362.00	1,664.71	6,362.00	10,693.00
515400	Health Insurance Benefit	6,162.00	5,853.34	5,997.00	2,743.71	5,997.00	9,595.00
521200	Contracted Services	2,300.00	281.76	2,300.00	210.08	2,300.00	3,000.00
522300	Cell Phone Costs	1,140.00	1,606.74	900.00	268.88	900.00	1,607.00
529900	Contracted Food Costs	80,000.00	11,121.25	40,000.00	15,178.66	40,000.00	45,000.00
531100	Postage	0.00	0.00	400.00	2.78	400.00	400.00
531400	Equipment < \$5,000	500.00	676.42	1,000.00	2,299.17	2,400.00	1,000.00
531500	Maintenance/Service Agreements	0.00	0.00	0.00	0.00	0.00	150.00
533000	Mileage/Travel	100.00	54.06	200.00	86.70	200.00	200.00
533500	Conventions & Meetings	200.00	65.00	175.00	150.00	175.00	300.00
534901	Raw Foods	0.00	17.23	175.00	18.04	175.00	175.00
534902	Consumable Supplies	800.00	176.65	4,000.00	773.28	4,000.00	3,000.00
553200	Rentals/Office Space	4,650.00	2,559.43	8,000.00	2,373.79	8,000.00	6,000.00
578408	In Kind-Administration	23,937.00	2,965.25	23,937.00	1,946.30	23,937.00	23,937.00
595200	AMSO Expenditure Transfer	9,587.00	3,488.50	9,587.00	1,930.40	9,587.00	9,587.00
Total expense:		196,025.00	45,098.50	137,885.00	40,299.70	139,285.00	173,231.00
Revenue - Expense:		0.00	52,380.15	0.00	-33,588.68	-1,396.00	0.00
Submitted by: _____							
Department/Division Head		Date					

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54602 Aging Supportive Services							
432001	Federal Aid	0.00	0.00	0.00	0.00	0.00	45,836.00
435515	State Aid - ADRC & Aging	87,355.00	73,631.00	68,741.00	4,882.00	68,741.00	69,027.00
465610	Other Revenues	0.00	206.03	10,000.00	48.00	10,000.00	0.00
485050	In Kind Contributions	4,860.00	5,496.60	5,000.00	3,166.00	5,000.00	5,000.00
Total revenue without property tax:		92,215.00	79,333.63	83,741.00	8,096.00	83,741.00	119,863.00
511100	Salaries and Wages	63,451.00	37,111.06	40,511.00	23,691.51	40,511.00	46,568.00
511200	Overtime	0.00	1.51	0.00	0.00	0.00	0.00
515000	Fringe Benefits	6,640.00	5,914.35	7,465.00	4,034.65	7,465.00	8,582.00
515400	Health Insurance Benefit	9,859.00	6,725.82	5,997.00	5,894.30	5,997.00	7,588.00
521200	Contracted Services	0.00	-175.00	15,268.00	839.16	15,268.00	1,500.00
521300	Accounting & Auditing Services	0.00	990.00	0.00	277.50	0.00	1,035.00
522500	Telephone	0.00	371.51	0.00	448.12	800.00	570.00
531400	Equipment < \$5,000	0.00	568.45	0.00	139.95	0.00	500.00
531500	Maintenance/Service Agreements	0.00	348.00	0.00	0.00	0.00	0.00
532200	Public Education/Materials	0.00	2,675.00	2,000.00	1,400.00	2,000.00	3,500.00
551900	Insurance Allocation	0.00	3,456.13	0.00	0.00	0.00	3,456.00
571700	Chore Service	0.00	4,668.95	0.00	6,748.75	5,200.00	34,159.00
578408	In Kind-Administration	4,860.00	5,496.60	5,000.00	3,166.00	5,000.00	5,000.00
595200	ASMO Expenditure Transfer	7,405.00	6,031.50	7,500.00	3,127.25	7,500.00	7,405.00
Total expense:		92,215.00	74,183.88	83,741.00	49,767.19	89,741.00	119,863.00
Revenue - Expense:		0.00	5,149.75	0.00	-41,671.19	-6,000.00	0.00

Submitted by:

Department/Division Head

Date

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54603 Home Delivered Meals							
432001	Federal Aid	0.00	0.00	0.00	0.00	0.00	61,862.00
435515	State Aid - ADRC & Aging	117,168.00	178,009.15	127,468.00	5,197.45	127,468.00	138,651.00
435517	State Aid - NSIP	15,745.00	22,755.00	83,145.00	0.00	83,145.00	22,755.00
465610	Other Revenues	165,000.00	143,876.19	169,771.00	52,094.95	169,771.00	132,200.00
485050	In Kind Contributions	5,000.00	17,285.23	12,082.00	4,541.40	12,082.00	17,285.00
Total revenue without property tax:		302,913.00	361,925.57	392,466.00	61,833.80	392,466.00	372,753.00
511100	Salaries and Wages	63,451.00	103,676.75	80,834.00	40,280.82	80,834.00	90,074.00
511200	Overtime	0.00	4.29	0.00	0.00	0.00	0.00
515000	Fringe Benefits	11,537.00	14,511.07	14,685.00	5,138.53	14,685.00	16,359.00
515400	Health Insurance Benefit	6,162.00	10,501.61	5,997.00	2,763.82	5,997.00	5,997.00
521200	Contracted Services	2,300.00	447.36	2,300.00	404.51	2,300.00	2,300.00
522300	Cell Phone Costs	1,140.00	454.07	900.00	171.54	900.00	330.00
522500	Telephone	285.00	268.91	0.00	2.18	0.00	0.00
529900	Contracted Food Costs	155,000.00	178,929.36	205,000.00	75,953.85	205,000.00	180,000.00
531000	Office Supplies	600.00	569.81	500.00	182.18	500.00	500.00
531100	Postage	0.00	1,031.34	1,200.00	659.47	1,200.00	1,200.00
531400	Equipment < \$5,000	500.00	1,726.08	1,500.00	-319.29	1,500.00	3,000.00
531900	Sundry/Miscellaneous	0.00	4,000.00	75.00	0.00	75.00	75.00
533000	Mileage/Travel	7,400.00	7,395.98	10,000.00	3,758.96	10,000.00	9,000.00
533900	Nonemployee Mileage	12,500.00	21,610.59	16,000.00	5,645.04	16,000.00	12,500.00
534901	Raw Foods	200.00	0.00	200.00	0.00	200.00	200.00
534902	Consumable Supplies	14,495.00	10,510.52	15,500.00	1,539.24	15,500.00	9,000.00
553200	Rentals/Office Space	4,650.00	9,183.77	8,000.00	2,558.20	8,000.00	6,200.00
578408	In Kind-Administration	5,000.00	0.00	12,082.00	0.00	8,082.00	17,285.00
578410	In Kind - HDM	0.00	17,285.23	0.00	4,541.40	4,000.00	0.00
595200	AMSO Expenditure Transfer	17,693.00	18,732.85	17,693.00	4,504.26	17,693.00	18,733.00
Total expense:		302,913.00	400,839.59	392,466.00	147,784.71	392,466.00	372,753.00
Revenue - Expense:		0.00	-38,914.02	0.00	-85,950.91	0.00	0.00
Submitted by: _____							
Department/Division Head		Date					

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54605 Senior Community Services - St							
435515	State Aid - ADRC & Aging	8,288.00	8,288.00	8,288.00	0.00	8,288.00	8,288.00
	Total revenue without property tax:	8,288.00	8,288.00	8,288.00	0.00	8,288.00	8,288.00
533900	Nonemployee Mileage	8,288.00	0.00	8,288.00	865.42	8,288.00	8,288.00
	Total expense:	8,288.00	0.00	8,288.00	865.42	8,288.00	8,288.00
	Revenue - Expense:	0.00	8,288.00	0.00	-865.42	0.00	0.00
Submitted by: _____							
	Department/Division Head	Date					
435515	State Aid - ADRC & Aging						
	Grant funding						8,288.00
	Total 435515 State Aid - ADRC & Aging:						8,288.00
	Total revenue:						8,288.00
533900	Nonemployee Mileage						
	Volunteer meal delivery drivers						8,288.00
	Total 533900 Nonemployee Mileage:						8,288.00
	Total expense:						8,288.00
	Total Account # 205-72-54605 Senior Community Services - St Detail:						0.00

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54606 Family Caregiver Support III-E							
432001	Federal Aid	0.00	0.00	0.00	0.00	0.00	14,113.00
435515	State Aid - ADRC & Aging	30,806.00	42,589.00	33,546.00	-4,739.00	33,546.00	35,845.00
465610	Other Revenues	0.00	0.00	5,500.00	0.00	5,500.00	250.00
485050	In Kind Contributions	293.00	578.64	293.00	856.40	1,026.00	293.00
Total revenue without property tax:		31,099.00	43,167.64	39,339.00	-3,882.60	40,072.00	50,501.00
511100	Salaries and Wages	4,654.00	8,513.36	5,386.00	2,051.26	5,386.00	6,197.00
515000	Fringe Benefits	868.00	217.98	975.00	228.50	975.00	1,122.00
515400	Health Insurance Benefit	2,465.00	0.00	0.00	0.00	0.00	0.00
521200	Contracted Services	0.00	700.00	0.00	0.00	0.00	0.00
531900	Sundry/Miscellaneous	1,000.00	5,010.14	1,000.00	1,565.06	1,000.00	5,000.00
532200	Public Education/Materials	500.00	0.00	500.00	542.50	500.00	1,368.00
533500	Conventions & Meetings	0.00	201.99	0.00	250.00	500.00	600.00
533803	Temporary Respite	20,540.00	15,430.67	30,385.00	3,564.49	28,200.00	35,286.00
578404	In Kind-Other	0.00	578.64	0.00	856.40	0.00	0.00
579800	In Kind - Admin	293.00	0.00	293.00	0.00	293.00	293.00
595200	AMSO Expenditure Transfer	779.00	634.90	800.00	849.36	800.00	635.00
Total expense:		31,099.00	31,287.68	39,339.00	9,907.57	37,654.00	50,501.00
Revenue - Expense:		0.00	11,879.96	0.00	-13,790.17	2,418.00	0.00

Submitted by:

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Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54607 State Benefit Specialist							
435515	State Aid - ADRC & Aging	43,388.00	38,820.00	0.00	0.00	0.00	0.00
485050	In Kind Contributions	3,952.00	2,835.12	0.00	0.00	0.00	0.00
Total revenue without property tax:		47,340.00	41,655.12	0.00	0.00	0.00	0.00
511100	Salaries and Wages	23,197.00	22,463.06	0.00	0.00	0.00	0.00
511200	Overtime	0.00	49.61	0.00	0.00	0.00	0.00
515000	Fringe Benefits	4,294.00	4,006.27	0.00	0.00	0.00	0.00
515400	Health Insurance Benefit	12,078.00	11,232.75	0.00	0.00	0.00	0.00
578408	In Kind-Administration	3,952.00	2,835.12	0.00	0.00	0.00	0.00
595200	ASMO Expenditure Transfer	3,819.00	3,110.97	0.00	0.00	0.00	0.00
Total expense:		47,340.00	43,697.78	0.00	0.00	0.00	0.00
Revenue - Expense:		0.00	-2,042.66	0.00	0.00	0.00	0.00

Submitted by:

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Date

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54608 Health Promotion & Disease Pre							
435515	State Aid - ADRC & Aging	5,344.00	5,556.00	5,272.00	0.00	5,272.00	5,613.00
	Total revenue without property tax:	5,344.00	5,556.00	5,272.00	0.00	5,272.00	5,613.00
511100	Salaries and Wages	0.00	4,531.00	0.00	0.00	0.00	0.00
521200	Contracted Services	5,344.00	1,025.00	5,272.00	475.00	5,272.00	5,613.00
	Total expense:	5,344.00	5,556.00	5,272.00	475.00	5,272.00	5,613.00
	Revenue - Expense:	0.00	0.00	0.00	-475.00	0.00	0.00

Submitted by:

Department/Division Head

Date _____

435515

State Aid - ADRC & Aging

Grant amount

5,613.00

Total 435515 State Aid - ADRC & Aging:	5,613.00
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Total revenue: 5,613.00

521200

Contracted Services

Contracted disease prevention and health promotion activities

5,613.00

Total 521200 Contracted Services:	5,613.00
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Total expense: 5,613.00

Total Account # 205-72-54608 Health Promotion & Disease Pre Detail:	0.00
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Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54611 St. Health Ins Program (SHIP)							
435515	State Aid - ADRC & Aging	4,538.00	8,401.00	0.00	0.00	0.00	0.00
485050	In Kind Contribution	468.00	289.32	0.00	0.00	0.00	0.00
Total revenue without property tax:		5,006.00	8,690.32	0.00	0.00	0.00	0.00
511100	Salaries and Wages	2,367.00	4,125.98	0.00	0.00	0.00	0.00
511200	Overtime	0.00	9.11	0.00	0.00	0.00	0.00
515000	Fringe Benefits	438.00	736.08	0.00	0.00	0.00	0.00
515400	Health Insurance Benefit	1,232.00	2,063.22	0.00	0.00	0.00	0.00
578408	In Kind-Administration	468.00	289.32	0.00	0.00	0.00	0.00
595200	AMSO Expenditure Transfer	501.00	317.45	0.00	0.00	0.00	0.00
Total expense:		5,006.00	7,541.16	0.00	0.00	0.00	0.00
Revenue - Expense:		0.00	1,149.16	0.00	0.00	0.00	0.00

Submitted by:

Department/Division Head

Date

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54612 OCI/MMA/St Pharmaceutical Asst							
435515	State Aid - ADRC & Aging	7,084.00	0.00	0.00	0.00	0.00	0.00
485050	In Kind Contribution	410.00	462.84	0.00	0.00	0.00	0.00
Total revenue without property tax:		7,494.00	462.84	0.00	0.00	0.00	0.00
511100	Salaries and Wages	3,787.00	3,667.16	0.00	0.00	0.00	0.00
511200	Overtime	0.00	8.10	0.00	0.00	0.00	0.00
515000	Fringe Benefits	701.00	653.69	0.00	0.00	0.00	0.00
515400	Health Insurance Benefit	1,972.00	1,833.71	0.00	0.00	0.00	0.00
578408	In Kind-Administration	410.00	462.84	0.00	0.00	0.00	0.00
595200	AMSO Expenditure Transfer	624.00	507.91	0.00	0.00	0.00	0.00
Total expense:		7,494.00	7,133.41	0.00	0.00	0.00	0.00
Revenue - Expense:		0.00	-6,670.57	0.00	0.00	0.00	0.00

Submitted by:

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Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54613 85-21 Transportation							
435515	State Aid - ADRC & Aging	175,237.00	175,787.00	170,982.00	166,537.00	170,982.00	166,537.00
465610	Other Revenues	12,245.00	561.00	15,000.00	484.50	15,000.00	1,200.00
485050	In Kind Contribution	4,392.00	4,917.96	4,392.00	1,297.55	4,293.00	4,918.00
	Total revenue without property tax:	191,874.00	181,265.96	190,374.00	168,319.05	190,275.00	172,655.00
411100	General Property Taxes	35,047.00	35,047.00	34,196.00	34,196.00	34,196.00	33,307.00
	Total revenue with property tax:	226,921.00	216,312.96	224,570.00	202,515.05	224,471.00	205,962.00
511100	Salaries and Wages	44,653.00	19,242.96	23,773.00	11,274.93	23,773.00	22,056.00
511200	Overtime	0.00	48.19	0.00	0.00	0.00	0.00
515000	Fringe Benefits	8,295.00	7,086.13	4,401.00	2,001.40	4,401.00	4,069.00
515400	Health Insurance Benefit	19,572.00	16,664.66	11,994.00	5,486.98	11,994.00	8,396.00
521200	Contracted Services	144,163.00	177,018.01	173,710.00	61,504.10	173,710.00	160,926.00
530000	Program Expenditures	0.00	4,824.04	500.00	0.00	500.00	200.00
578408	In Kind-Administration	4,392.00	4,917.96	4,392.00	1,297.55	4,392.00	4,918.00
595200	AMSO Expenditure Transfer	5,846.00	5,396.62	5,800.00	1,286.93	5,800.00	5,397.00
	Total expense:	226,921.00	235,198.57	224,570.00	82,851.89	224,570.00	205,962.00
	Revenue - Expense:	0.00	-18,885.61	0.00	119,663.16	-99.00	0.00
Submitted by: _____		_____					
Department/Division Head		Date					

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54614 Alzheimers Family Caregiver Su							
435515	State Aid - ADRC & Aging	29,358.00	10,089.00	36,694.00	5,660.00	36,694.00	33,723.00
485050	In Kind Contributions	293.00	289.32	293.00	856.40	1,026.00	289.00
Total revenue without property tax:		29,651.00	10,378.32	36,987.00	6,516.40	37,720.00	34,012.00
511100	Salaries and Wages	2,327.00	8,513.03	5,386.00	2,050.71	5,386.00	6,197.00
515000	Fringe Benefits	434.00	217.90	975.00	228.80	975.00	1,122.00
515400	Health Insurance Benefit	1,232.00	0.00	0.00	0.00	0.00	0.00
521200	Contracted Services	0.00	827.40	0.00	0.00	0.00	0.00
531900	Sundry/Miscellaneous	1,000.00	746.43	1,000.00	0.00	1,000.00	1,000.00
533803	Temporary Respite	23,975.00	4,388.72	28,883.00	4,950.48	28,883.00	25,087.00
578408	In Kind - Administration	293.00	289.32	293.00	856.40	1,026.00	289.00
595200	AMSO Expenditure Transfer	390.00	317.45	450.00	849.36	450.00	317.00
Total expense:		29,651.00	15,300.25	36,987.00	8,935.75	37,720.00	34,012.00
Revenue - Expense:		0.00	-4,921.93	0.00	-2,419.35	0.00	0.00

Submitted by:

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Date

Account Number	Description	2022 Budget	2022 Actual	2023 Budget	06/30/23 Actual	2023 Est. Actual	2024 Request
PRELIMINARY							
Account # 205-72-54616 Dementia Specialist							
435515	State Aid - ADRC & Aging	120,272.00	108,797.00	80,000.00	34,068.00	80,000.00	108,797.00
465610	Other Revenues	0.00	0.00	39,403.00	0.00	39,403.00	0.00
485050	In Kind Contributions	5,856.00	5,786.04	5,046.00	2,595.15	5,046.00	5,786.00
	Total revenue without property tax:	126,128.00	114,583.04	124,449.00	36,663.15	124,449.00	114,583.00
411100	General Property Taxes	0.00	0.00	0.00	0.00	0.00	7,339.00
	Total revenue with property tax:	126,128.00	114,583.04	124,449.00	36,663.15	124,449.00	121,922.00
511100	Salaries and Wages	55,272.00	52,954.33	56,934.00	27,060.06	56,934.00	63,130.00
515000	Fringe Benefits	10,254.00	9,359.63	10,560.00	4,873.95	10,560.00	11,703.00
515400	Health Insurance Benefit	24,648.00	23,921.37	23,988.00	10,994.50	23,988.00	23,988.00
521200	Contracted Services	4,000.00	0.00	1,500.00	0.00	1,500.00	0.00
522300	Cell Phone Costs	720.00	664.42	500.00	240.10	500.00	664.00
530000	Program Expenditures	7,627.00	6,990.17	6,921.00	689.78	6,921.00	3,702.00
531100	Postage	200.00	0.00	0.00	0.00	0.00	0.00
531200	Copies/Printing	600.00	382.20	500.00	468.75	500.00	800.00
531400	Equipment < \$5,000	157.00	0.00	1,500.00	0.00	1,500.00	500.00
531900	Sundry/Miscellaneous	1,200.00	175.20	0.00	0.00	0.00	0.00
532200	Public Education/Materials	3,000.00	1,570.07	5,000.00	1,571.30	5,000.00	3,000.00
533000	Mileage/Travel	4,000.00	618.45	3,000.00	500.55	3,000.00	1,500.00
533500	Conventions & Meetings	800.00	25.11	1,000.00	0.00	1,000.00	800.00
578408	In Kind - Administration	5,856.00	5,786.04	5,046.00	2,595.15	5,046.00	5,786.00
595200	AMSO Expenditure Transfer	7,794.00	6,348.99	8,000.00	2,573.89	8,000.00	6,349.00
	Total expense:	126,128.00	108,795.98	124,449.00	51,568.03	124,449.00	121,922.00
	Revenue - Expense:	0.00	5,787.06	0.00	-14,904.88	0.00	0.00

Submitted by:

Department/Division Head

Date