A. Organization

Address the following in the space provided below:

1. Name a designated project director who is directly responsible to the sponsor for the management of the project. Include information about the director's experience, qualifications and job duties. Indicate if the director will have additional programmatic responsibilities.
No program change, with exception that Fritz & O'Hare are not a part of the ADRC meetings/planning etc. Director has been a part of the Agency for 37 years.

2. Describe how this program will operate within your organizational structure. How will the ADRC seek guidance and perspective that benefits individuals experiencing disabilities?
No changes

3. Describe the proposed staffing of the ADRC. Include all positions, FTEs, contracted labor, and responsibilities.
The FTE's all changed due to a time study conducted in October 2023:

Carla Frase, Director: Attends all ADRC Leadership Meetings, Oversees the ADRC Supervisor, Directs the ADRC Proposal and ADRC Grant Application w/ADRC staff; .05 FTE

Verjean Noojin, Choices Unit Supervisor: Attends all ADRC Quality Review Meetings, works directly with ADRC Options Counselors, .11 FTE

Beth Williams, Fiscal Officer: Assists with Budget of ADRC program, compiles all financial ADRC reports, .05 FTE

Deanna Rentschler, Fiscal Assistant Payables: Processes all ADRC expense payments, .06FTE

Amy Mason, Fiscal Assistant Receivables: Covers the phone for ADRC calls, files claims of ADRC expenses, and assists with payroll of ADRC staff, .06 FTE

Tracie Fossler, Administrative Assistant/Receptionist: Answers the phone for ADRC calls, opens all mail pertaining to ADRC, .06 FTE

Rachel Theye, ADRC Options Counselor: Works directly with ADRC clients/referrals, .19 FTE

Dylan Dell-Haro, ADRC Options Counselor: Works directly with ADRC clients/referrals, .18 FTE

Karen Klover, ADRC Options Counselor: Works directly with ADRC clients/referrals, .11 FTE

4. Describe the ADRC's physical location in the service area. Include how individuals experiencing disabilities can be accommodated when utilizing the physical location. Describe how individuals who are unable to go to the physical location will be able to connect with the ADRC.
No changes

5. PeerPlace is the software used to track client information and units of service. Grantee is required to follow State Unit on Aging prescribed data entry practices. Describe your experience with PeerPlace and how a client and service unit tracking system will be implemented.
No changes

6. The ADRC will be welcoming and accessible. Describe how the ADRC will work with individuals who experience all types of disabilities, those who do not speak English as a first language, or whose culture may affect how they use the ADRC.
No changes

7. Describe how the ADRC will ensure that its services are objective, unbiased, and in the best interest of the client.
No changes

8. Describe current & future collaborations as it relates to the ADRC.
No changes

9. Describe how the agency will implement a quality assurance process.
No changes

B. Service Provision (30 Points)

10. Describe the marketing and outreach the ADRC will utilize to make these services known to members of the target population. Address how the ADRC will reach individuals who are isolated as well as community agencies and service providers in the service area. Identify how the ADRC will work with hospitals, nursing homes, assisted living facilities, and home health care agencies to accept referrals.
No changes

11. Describe how the ADRC will provide Information & Referral services.
No changes

12. Describe how the ADRC will provide Options Counseling services.
No changes

13. Describe how the ADRC will provide Transitional Options Counseling services.
No changes

14. Describe how the ADRC will provide Benefits Assistance.
No changes

15. Describe how the ADRC will provide Mobility Training.
No changes

16. Describe how the ADRC will provide individuals seeking assistance with home care with a home care registry as well as information about their rights and responsibilities as home care consumers.
No changes

17. Describe how the ADRC will provide individual and systems advocacy. This includes information about client rights and assistance with exercising those rights.
No changes

18. Describe the role the ADRC will have in emergency preparedness and response in the service area. Will the ADRC have the equipment necessary to operate remotely or at an alternate work location? If the ADRC has an emergency preparedness plan, please attach it.
No changes

Part I Applicant Information

Organization Name: Blue Rivers Area Agency on Aging	Date of Application: November 28, 2022
Name – Contact Person: Carla Frase	402-223-1376
Address (Street, City, State, Zip): 103 Eastside Blvd Beatrice, NE 68310	
Email Address: Carla.frase@blueriversaaa.org	
Signature – Authorized Representative *Carla Frase*	Date Signed: *November 28, 2022*

Attach the following to the completed application form:

A. Authorized organizational representative approval of the ADRC application.
B. Letters of support (optional).
C. Provide an organizational chart for the existing ADRC program or a proposed organization chart for a newly proposed program with position titles and staff names (if staff names are available).
D. Other attachments (optional).

Part II – Executive Summary, 1 page (10 Points)

Provide your response to the State Unit on Aging Request for Information in this portion which has addressed the following:

A. Planned service area,
B. Organizational structure,
C. Office location(s),
D. The approach to providing ADRC services, and
E. Any significant challenges faced by the proposed ADRC.

Part III – Project Proposal, 5 pages (60 Points)
A. Organization (30 Points)

Address the following in the space provided below:

1. Name a designated project director who is directly responsible to the sponsor for the management of the project. Include information about the director's experience, qualifications and job duties. Indicate if the director will have additional programmatic responsibilities. **(2 Points)**

Carla Frase, Executive Director will be directly responsible for ADRC Management. Director participates in the ADRC Leadership Meetings with AAA Directors, Disability Partners, Fritz & O'Hare Associates and State Unit on Aging. Director also participates in all Disability Education Series Meetings sponsored by the Nebraska Disability Advocates, including training on the Olmstead Act. Director participates in monthly meetings with ADRC staff/Supervisor. Director is knowledgeable about all services provided by Agency and has been a part of the Agency for over 35 years.

2. Describe how this program will operate within your organizational structure. How will the ADRC seek guidance and perspective that benefits individuals experiencing disabilities? **(3 Points)**

   Agency staff attend all consumer meetings, have local networking partnerships with agencies, attend all employer trainings that are available in the ADRC network and do research when clients have novel questions/needs.

3. Describe the proposed staffing of the ADRC. Include all positions, FTEs, contracted labor, and responsibilities. **(2 Points)**

   Carla Frase, Director: Attends all ADRC Leadership Meetings, Oversees the ADRC Supervisor, Directs the ADRC Proposal and ADRC Grant Application w/ADRC staff; .1 FTE

   Verjean Noojin, Choices Unit Supervisor: Attends all ADRC Quality Review Meetings, works directly with ADRC Options Counselors, .1 FTE

   Beth Williams, Fiscal Officer: Assists with Budget of ADRC program, compiles all financial ADRC reports, .02 FTE

   Deanna Rentschler, Fiscal Assistant Payables: Processes all ADRC expense payments, .03FTE

   Amy Mason, Fiscal Assistant Receivables: Covers the phone for ADRC calls, files claims of ADRC expenses, and assists with payroll of ADRC staff, .05 FTE

   Tracie Fossler, Administrative Assistant/Receptionist: Answers the phone for ADRC calls, opens all mail pertaining to ADRC, .03 FTE

   Rachel Theye, ADRC Options Counselor: Works directly with ADRC clients/referrals, .2 FTE

   Dylan Dell-Haro, ADRC Options Counselor: Works directly with ADRC clients/referrals, .16 FTE

   Karen Klover, ADRC Options Counselor: Works directly with ADRC clients/referrals, .15 FTE

4. Describe the ADRC's physical location in the service area. Include how individuals experiencing disabilities can be accommodated when utilizing the physical location. Describe how individuals who are unable to go to the physical location will be able to connect with the ADRC. **(2 Points)**

The Agency main office is ADA compliant. ADA compliant transportation is available across service area. ADRC staff will meet individuals at their homes if they are unable to transport to the main office in Beatrice. All centers are ADA accessible as meeting points for individuals and ADRC staff.

5. PeerPlace is the software used to track client information and units of service. Grantee is required to follow State Unit on Aging prescribed data entry practices. Describe your experience with PeerPlace and how a client and service unit tracking system will be implemented. **(3 Points)**

   Agency staff have been utilizing PeerPlace since it was implemented. All staff are trained and attend workshops that update PeerPlace software. ADRC staff utilize PeerPlace daily and are able to input contacts that are anonymous per individual's preference. PeerPlace reports are printed monthly for review by Director and ADRC staff.

6. Describe any previous experience the organization has with providing ADRC services. Has the organization been designated as a Nebraska ADRC previously? If yes, include information on service units provided in the previous three fiscal years including all ADRC services provided, and funding received for the program. **(4 Points)**

   Blue Rivers was one of seven original Area Agencies on Aging that participated in the development of the Nebraska ADRC legislation. Since the implementation of the ADRC, Agency staff have worked with eligible clients on the phone and in person to coordinate services and make referrals to supporting agencies that best serve the client.

	Units of Service		
	SFY20	SFY21	SFYF22
I & R	232	674	674
Options Counseling			
Transitional Options Counseling			
Benefits Assistance			
Mobility Training			

Funding received:

	SFY20	SFY21	SFYF22
ADRC Funding:	90,273	71,561	72,338

7. The ADRC will be welcoming and accessible. Describe how the ADRC will work with individuals who experience all types of disabilities, those who do not speak English as a first language, or whose culture may affect how they use the ADRC. **(3 Points)**

   Agency is Title VI compliant in all service delivery, gives client preference of working with same gender. Agency is all inclusive and ensures non-discrimination to all individuals. Agency utilizes translation services as necessary

8. Describe how the ADRC will ensure that its services are objective, unbiased, and in the best interest of the client. **(3 Points)**

ADRC staff utilizes person-centered planning when addressing all client needs. Agency serves all elderly clients and clients with disabilities regardless of income status. Agency staff are very familiar with the service area and the resources available therein. Agency Personnel Policy states a code of ethics mandating equal treatment regardless of race, color, religion, sex, national origin, age, disability, marital status, pregnancy, military status or any other prohibited basis of discrimination under applicable local, state and federal law.

9. Describe current & future collaborations as it relates to the ADRC. **(2 Points)**

   Director attends all ADRC Leadership meetings. Choices Supervisor, along with ADRC staff, are currently presenting Outreach information at local centers. Other community events are planned. ADRC staff are involved with monthly Consumer Review meetings. ADRC staff collaborates with local hospitals, nursing facilities and healthcare providers. Agency will continue all these meetings and interactions going forward, always seeking additional resources and partnerships.

10. Describe how the agency will implement a quality assurance process. **(2 Points)**

    Blue Rivers Agency on Aging plans to conduct a survey for all clients assisted. This will consist of the following four questions: 1. Did you feel that you received a resolution to your question or call? 2. Were you assisted in a timely manner? 3. Would you recommend our Agency to a friend or family member? 4. How could we better serve you? This survey would be fluid and a living document for additional questions or updates. Feedback from these surveys will be utilized to improve the quality of services provided.

11. Reserved for suggestions from SUA staff. **(2 Points)**
    Click or tap here to enter text.

12. Reserved for suggestions from SUA staff. **(2 Points)**
    Click or tap here to enter text.

    B. Service Provision (30 Points)

13. Describe the marketing and outreach the ADRC will utilize to make these services known to members of the target population. Address how the ADRC will reach individuals who are isolated as well as community agencies and service providers in the service area. Identify how the ADRC will work with hospitals, nursing homes, assisted living facilities, and home health care agencies to accept referrals. **(4 Points)**

    Blue Rivers Agency has an ADRC ad in our Agency newsletter, The Table Talk, every month, which is dispersed to all clients, local libraries, hospitals, centers, YMCA, and to our board members. This publication is also available on our website. ADRC brochures are available at all centers. ADRC staff participate in Health Fairs, Community Events, and Outreach at centers as well as with any partner that requests that information.

14. Describe how the ADRC will provide Information & Referral services. **(3 Points)**

Contact is made with individuals via phone, face to face, or virtually; this is per the individual's choice. Individual's long and short-term needs are identified and discussed. Appropriate resources are identified, and are provided to individual; an appropriate referral is made for the individual as indicated. Individual will be contacted for follow-up if they so choose.

15. Describe how the ADRC will provide Options Counseling services. **(3 Points)**

Individuals in need of long-term care needs are provided with the greatest possible number of community-based options to allow the individual to live as independently as possible in the setting of choices. Support and advocacy during the process is provided to the individual by the ADRC staff and follow-up is provided if individual chooses. Two Care Managers are identified to pursue this service. Demand for this service is expected to increase due to pandemic stresses on individuals.

16. Describe how the ADRC will provide Transitional Options Counseling services. **(3 Points)**

ADRC staff will refer the individual to the appropriate resource in their service area, via the ADRC Website and 211. These resources will include but are not limited to: Monroe Meyer, Easter Seals, League of Human Dignity.

17. Describe how the ADRC will provide Benefits Assistance. **(3 Points)**

ADRC staff will refer the individual to the appropriate resource in their service area via the ADRC Website and 211. These resources will include but are not limited to: Monroe Meyer, Easter Seals, League of Human Dignity, and Agencies on Aging providing this assistance.

18. Describe how the ADRC will provide Mobility Training. **(3 Points)**
ADRC staff will refer the individual to the appropriate resource in their service area via the ADRC Website and 211. This resource will include but is not limited to: League of Human Dignity.

19. Describe how the ADRC will provide individuals seeking assistance with home care with a home care registry as well as information about their rights and responsibilities as home care consumers. **(3 Points)**

ADRC staff will provide a list of home care providers in their area. Consideration will be given in regards to their financial status. The individual's rights and responsibilities will be addressed by the ADRC staff in correlation with the Home Care Consumer Rights as identified by the State Unit on Aging Program Reference Guide.

20. Describe how the ADRC will provide individual and systems advocacy. This includes information about client rights and assistance with exercising those rights. **(4 Points)**

All Blue Rivers Agency on Aging staff, including ADRC staff, work under the guidelines of Title VI, are ADA compliant and provide clarifications, referrals or aid in communication between individuals and government programs or private service providers. ADRC staff will offer education to individuals about fraud related to incoming communications and will consult with and refer to Legal Services Providers if applicable.

21. Describe the role the ADRC will have in emergency preparedness and response in the service area. Will the ADRC have the equipment necessary to operate remotely or at an alternate work location? If the ADRC has an emergency preparedness plan, please attach it. **(4 Points)**

All Administration staff, including ADRC staff, have the capability to work remotely. All Agency staff are provided a copy of the Agency Disaster Plan and are aware of the responsibilities detailed in the document. ADRC staff have been provided with Agency cell phones and are available to respond in a timely manner.

Part IV – ADRC Budget (30 Points)

The Budget Form and Budget Narrative must be submitted with this application. Application evaluation will be partially based on the reinvestment of MAC funds. Please describe how MAC funds will be used.

MAC funds will be utilized as a supplement to the ADRC program, as a balance to keep the program financially intact and to ensure the ability to continue to serve the citizens in our eight county service area adequately.

See the attached documents as described below:

- Budget Form
- Budget Narrative

Please respond to all questions and submit responses and requested documents via email to: DHHS.Aging@nebraska.gov by 11/30/2022.

Budget Narrative – Blue Rivers Area Agency on Aging

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	$70,000			**$70,000**	Carla Frase, Project Director: .1 FTE; Verjean Noojin, ADRC Supervisor: .11 FTE Beth Williams, Fiscal/HR Manager: .05 FTE; Deanna Rentschler, Fiscal Asst. Payables: .06 FTE; Amy Mason, Fiscal Asst. Receivables: .06 FTE; Tracie Fossler, Receptionist/Administrative Asst.: .06 FTE; Rachel Theye, Options Counselor: .19 FTE; Dylan Dell-Haro, Options Counselor: .18 FTE; Karen Klover, Options Counselor: .11 FTE. FTE's determined by current time study for all staff, with exception of Project Director and Fiscal/HR Manager, which is determined by the Admin Cost Allocation, based on Admin Staff And all per the Agency Cost Allocation Plan
Travel	$300			**$300.00**	Mileage Reimbursement of Governing Board Members and Advisory Council Members, based on Agency Cost Allocation of All Agency staff allocations coding, currently: 2% of mileage expense reimbursement. Staff car gas expense cost allocated by ADRC staff visiting ADRC clients
Print & Supp.	$1,000			**$1,000**	Payroll processing costs, copier/printer contracts, office supplies, postage meter ink per Admin cost allocation per the Agency Cost Allocation Plan.
Equipment	$0.00			**$0.00**	

Build Space	$2,600			**$2,600**	Rent of Administration building, cost allocated by all staff residing in building, per the admin cost allocation per Agency Cost Allocation Plan.
Comm. & Utilt.	$1,200			**$1,200**	Notice of board meetings, building utilities, agency phones, admin internet expenses, postage meter lease, ADRC staff cell phones all cost allocated per Admin cost allocation, based on Agency Cost Allocation Plan
Other	$2,000			**$2,000**	Payroll Direct Deposit Expense, admin building pest control, sanitation of admin building, admin lawn mowing, snow removal of building parking lot, admin building cleaning, US Aging membership dues, Agency workmans comp, liability, property, staff car insurance expense cost allocated utilizing Admin cost allocation per Agency Cost Allocation Plan
Contractual	$0.00			**$0.00**	
TOTAL	**$77,100**			**$77,100**	

Units of Service Tab

For those services currently provided by your organization, enter the projected number of units to be provided for the current year ended June 30, 2023.

For those services to be provided for the year ended June 30, 2024, enter the projected number of units to be provided for those 12 months.

2. ADRC Budget tabs

There are three "budgets" on this tab, an initial proposal budget, a revised budget, and a "Net Adjustments" budget.

Initial Proposal Budget (To be completed for the November 2022 submission)

Please enter your agency's budget for the coming year in the top section. This will eventually become the agency's approved budget to work from for budget revisions.

Columns H - R (Lines 1-17c.)

Lines 1-8b. For each service the applicant plans to provide, enter the best estimate of costs for each cost category for the period of July 1, 2023 through June 30, 2024. For any amounts listed on line 8b, provide the relevant information on the ContractorSubaward Details tab. Any items listed on line 4 should meet the definition provided on the Equipment Itemization tab and additional information must be entered on that tab.

Lines 10 - 15. No match or agency support is required for this budget, so these fields have been hidden and should remain blank.
Line 17b. CASA ADRC: The Composite total ADRC should be equal to the allocated amount under the ADRC column on the Reservation Table.

17c. MAC Return: Funds on this line are 1) estimated to be received by the agency as a result of participation in Medicaid Administrative Claiming and 2) used to support a Medicaid-related service.

General Information - all tabs

Columns and rows that are not relevant to this funding have been hidden/grayed out.

Additional rows can be unhidden on the ContractorSubaward Details tab, if needed.

Enter the applicant name where requested.

Revised budgets (Not used for the 5/31/22 submission)

The agency's proposed revised budget is entered in the "Revised Budget" section. If no changes are proposed in a service type(s), simply enter the same data entered above from the last approved budget. To move funds from one program to another program, reduce expenses and revenue in the first, and add it to others. Changes will be reflected in the "Net Adjustments" budget on each tab. NO DATA is entered in the "Net Adjustments" section.

3. Notes on Budget Changes

1. Agencies may rebudget between categories (line items) of up to 5% of the grant award without SUA approval. For example, if awarded amount is $300,000, an agency may make budget changes of up to $15,000 without needing SUA approval. All service minimums for in-home, access, and legal services must still be met. "Categories" refers to lines 1 through 8b.

			Units of Service				
	Applicant Name						
Taxonomy #	**Service Name**	**Service Unit**	07/01/23 - 12/31/23 (Actual)	01/01/24 - 06/30/24 (Projected)	07/01/23 - 06/30/24 (Combined)	07/01/24 - 06/30/25 (Projected)	**Change (%)**
ADRC Direct Services							
40	Information & Referral	Contact	309	320	629	650	3.34%
41	Options Counseling	Hour	34	70	104	110	5.77%
42	Transitional Options Counseling	Hour			-		0.00%
43	Benefits Assistance	Hour			-		0.00%
44	Mobility Training	Hour			-		0.00%
45	Point of Entry	Hour			-		0.00%
46	Unmet Service Needs	Hour			-		0.00%
47	Home Care Provider Registry	Hour			-		0.00%

FY 2025 BUDGET - ADRC

		Applicant Name - Initial Proposed B
		ADRC SERVICES

[Taxonomy #, Service, Unit Measure]	40. Info & Referral (1 contact)	41. Options Counseling (1 hour)	42. Transitional OC (1 hour)	43. Benefits Assistance (1 hour)	44. Mobility Training (1 hour)	45. Point of Entry
COST CATEGORIES						
1. Personnel	$66,500	$3,500				
2. Travel	$300					
3. Print & Supp.	$1,000					
4. Equipment						
5. Build Space	$2,600					
6. Comm. & Utilit.	$1,200					
7. Other	$2,000					
8a. Raw Food						
8b. Contractual						
9. GROSS COST	**$73,600**	**$3,500**	**$0**	**$0**	**$0**	**$0**
FUNDING						
17b. CASA ADRC	$51,231					
17c. MAC Return	$22,369	$3,500				
19b. TOTAL SUA COST	**$73,600**	**$3,500**	**$0**	**$0**	**$0**	**$0**
21. CM Client Responsibility						

Projected Units	650.00	110.00	0.00	0.00	0.00	
Gross Cost (9) Per Unit	$ 113.23	$ 31.82				
Match (16b) Per Unit	$ -	$ -				
Total SUA (19b) Per Unit	$ 113.23	$ 31.82				
CM (19) Per Unit						

ADRC Budget Request

FY 2025 BUDGET - ADRC　　　**udget**

[Taxonomy #, Service, Unit Measure]	46. Unmet Service Needs	47. Home Care Provider Registry	ADRC TOTAL	TOTAL
COST CATEGORIES				
1.　Personnel			$70,000	$70,000
2.　Travel			$300	$300
3.　Print & Supp.			$1,000	$1,000
4.　Equipment			$0	$0
5.　Build Space			$2,600	$2,600
6.　Comm. & Utilit.			$1,200	$1,200
7.　Other			$2,000	$2,000
8a. Raw Food			$0	$0
8b. Contractual			$0	$0
9.　GROSS COST	$0	$0	$77,100	$77,100
FUNDING				
17b.　CASA ADRC			$51,231	$51,231
17c. MAC Return			$25,869	$25,869
19b.　TOTAL SUA COST	$0	$0	$77,100	$77,100
21. CM Client Responsibility				

Projected Units				
Gross Cost (9) Per Unit				
Match (16b) Per Unit				
Total SUA (19b) Per Unit				
CM (19) Per Unit				

ADRC Budget Request

Applicant Name
COST ITEMIZATION
Equipment/Capital Expenditures** - Provide Cost Itemization of single items costing $5,000 or more.*

*Equipment means the net invoice price of equipment including any attachments, accessories, modifications or auxiliary apparatus
necessary to make it usable for the purpose of which it is acquired.
** Capital expenditures includes data processing, software, renovation, or new construction.
Including an item here does not serve as a prior approval request for the purchase of any capital expenditure or equipment item, and
approval of an Area Plan budget does not serve as SUA's approval to purchase any item here.

Applicant Name
Subawardee/Contractor Details

Provider Name	Service Provided	Relationship	Total Provider Cost
	40. Information & Referral	Subaward	
	40. Information & Referral	Subaward	
	40. Information & Referral	Subaward	
	40. Information & Referral	Subaward	
	40. Information & Referral	Subaward	
	40. Information & Referral	Subaward	
	40. Information & Referral	Subaward	
	40. Information & Referral	Subaward	
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