

## 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.

*Casey Muzic will be the designated Project Director and will generally oversee our ADRC. Other members of staff will provide direct programmatic services. Casey has more than 20 years of experience in the fields of healthcare, aging, and advocacy. Her priorities are to develop networks and other partnerships that support older adults to live healthy and secure lives at home. Casey has BS degrees in Human Development and Social Work from the University of Nebraska Kearney, and a Master of Social Work degree from the University of Kansas.*

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

*We have the staff to help screen calls, provide information, and make interdepartmental referrals as well as referrals to other agencies to best suit the client's needs. Once the need has been determined and referred to our trained ADRC staff, we will assist with all manner of benefit applications and suggest solutions and choices for the client to solve their concerns. Some clients have a greater need for understanding or more ongoing support which we are happy to provide either through the ADRC program or other resources available to us as an Agency on Aging. We continue to keep up to date on local community resources, staff trainings, CEU opportunities, and focus on person-centered trainings and disability partner trainings.*

3. Describe the proposed staffing of the ADRC. Include all positions, FTEs, contracted labor, and responsibilities.

*We currently have one full time ADRC Options Counselor, and multiple other administrative and support staff that can be utilized to keep the ADRC program running smoothly.*

*Staffing should be as follows (\*\*FTE's are not correct, just place holders\*\*)*

- *Project Director (.15 FTE) Generally Oversees the project*
- *ADRC Supervisor (.50 FTE) Oversees the Programmatic Activities*
- *ADRC Counselor (2 FTE) Provides Most of the Programmatic Activities*
- *I&R Staff (.05 FTE) Screens Calls, provides information, and refers to ADRC Counselor or other resource if necessary*
- *Support Staff (.15 FTE) Provide program support – IT, Fiscal, Etc*

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.

*Midland Area Agency on Aging is planning to continue all of the ADRC Program Services currently offered within our service area (Adams, Clay, Hall, Hamilton, Howard, Merrick, Nuckolls, Webster counties).*

*Our central office is wheelchair accessible and we also offer over the phone or in home assistance with ADRC services to reach everyone in our service area.*

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.
- We currently track multiple programs in PeerPlace and are confident in our data entry. As we continue to expand our ADRC services, we will continue to modify how we track and gather information to remain accurate with our data entry. In using Peer Place we monitor current referrals, ensure timely follow up and make sure that all service units are being captured.*

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.
- To make sure that we are able to communicate with all individuals we provide services to utilize translation services, including individuals and technology. We have completed Cultural Sensitivity training and also work with the Multicultural Coalition to find additional resources in the community.*

7. Describe how the ADRC will ensure that its services are objective, unbiased, and in the best interest of the client.

*All eligible services will be performed without regard to age, race, nationality or other similar standing held by the client. We serve elderly people and people with disabilities, regardless of their income, health condition and long-term care needs. We provide information and assistance to promote health, safety and independence; We give options and choices for the issues raised by the client. We use a self-directed approach with clients to allow them to make the necessary decisions that suits their needs. No decisions are made on their behalf.*

8. Describe current & future collaborations as it relates to the ADRC.

*There is good collaboration among the other ADRC agencies across the state and we are able to connect and brainstorm ideas with other agencies that may have more knowledge of the service that would cover a client need. ADRC also functions in conjunction with other community supports and services. Because of this, the ADRC Options Counselors and Supervisor also take part in monthly case management meetings with other agencies in our eight county region.*

9. Describe how the agency will implement a quality assurance process.  
*Supervision of the ADRC is provided through weekly meetings and monitoring of the Peer Place documentation and reports. There is an open door policy for the Options Counselors to let the Supervisor know of any concerns or struggles that would need to be addressed immediately. ADRC Peer Place reports are provided to the Executive Director for further oversight at MAAA. In addition we have created a ADRC email account used to track referrals.*

## **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.

*We have signed up with other data base systems including 211 and Unite Us. We also discuss our services monthly in Community Collaborative meetings which include staff from hospitals, nursing homes, assisted livings and home care agencies. We educate the staff in all of our senior centers regarding ADRC services and promote the ADRC in our monthly agency newsletter and on Face Book. In addition we promote ADRC at local events including Health Fairs and Day of Caring.*

11. Describe how the ADRC will provide Information & Referral services.

*Our I&R Staff will take the initial contact and determine the initial needs of the contact. The I&R staff will provide information as needed to the contact and when another service is needed or desired, they will make the referral to either our ADRC Counselors or another Agency if needed. They record all contact in PeerPlace at the time of contact.*

12. Describe how the ADRC will provide Options Counseling services.

*For those needing more than just a simple application under benefits assistance, we can help walk them through the full range of applications and put them in touch with many different resources that fit their specific needs. We create an action plan with the client on steps needed to connect clients to necessary community resources and help them meet their long-term goals. We will then follow up with them periodically until they are in a place that they feel they no longer need assistance.*

13. Describe how the ADRC will provide Transitional Options Counseling services.

*Transitional Options Counseling can be offered to individuals that have a need that is a time-limited problem resulting from a short term issue. The ADRC can assist to implement, follow up and coordinate services with other facilities to meet a short term need. This collaboration would*

*happen in the case of someone who has either had surgery, a fall or something that is limiting their ability to care safely for themselves although they had been able to live and function independently prior to their current issue. Clients would not have a long term need at this time.*

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14. Describe how the ADRC will provide Benefits Assistance.

*Benefits assistance is a well utilized service. We assist clients with applications for Social Security, Medicare/Medicaid, SNAP Benefits, Housing or utility assistance and other community based resources as needed. We stay involved with the client through the verification process until the application process is complete.*

15. Describe how the ADRC will provide Mobility Training.

*Some people are unaware of how Public Transit works or sometimes that it even exists. We will have our staff walk the client through the process of utilizing local public transit and if they qualify, get them familiar with how to book a ride on public transit where the fare is paid through a Medicaid provider at no cost to them.*

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.

N/A

17. Describe how the ADRC will provide individual and systems advocacy. This includes information about client rights and assistance with exercising those rights.

*ADRC informs individuals of their rights, enabling people to make informed, cost-effective decisions about LTC and delaying or preventing the need to apply for public assistance to pay for LTC services. For further assistance ADRC staff would refer to Elder Access, Ombudsman, Disability Rights, and other advocacy groups.*

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.

*Per our agency emergency preparedness plan, the ADRC staff will contact clients in the disaster area to assess and ensure that their needs are being met. The ADRC staff will have the equipment necessary to operate remotely and work at an alternate work location.*

### FY25 Budget Narrative – Midland Area Agency on Aging

<b>Object Class Category</b>	<b>Federal Funds</b>	<b>Non-Federal Cash</b>	<b>Non-Federal In-Kind</b>	<b>TOTAL</b>	
<b>Personnel</b>	\$184,800			<b>\$184,800</b>	.15 FTE Casey Muzic, Executive Director .20 Linda O'Brien, Fiscal Manager Crystal Jensen, Fiscal Assistant Christopher Morrison, IT Analyst/Payroll Hailey Rodgers, I/R .50 Nicole Doremus, ADRC Supervisor 2.0 Felicia Bushhousen & Sheryl Timko, ADRC Options Counselors
<b>Travel</b>	\$ 1,000.00			<b>\$1,000.00</b>	Cost of mileage or agency fuel for community meetings, in home meetings with clients
<b>Print &amp; Supp.</b>	\$7,500.00			<b>\$7,500.00</b>	Copy paper, printer toner, pens, notebooks and other miscellaneous supplies, Advertising for board meetings and job openings
<b>Equipment</b>	\$0.00			<b>\$0.00</b>	None anticipated
<b>Build Space</b>	\$3,000.00			<b>\$3,000.00</b>	ADRC % of building rent and storage rent
<b>Comm. &amp; Utilt.</b>	\$1,250.00			<b>\$1,250.00</b>	ADRC % of phone, internet, postage
<b>Other</b>	\$3,000.00			<b>\$3,000.00</b>	Building maintenance (including janitorial services), annual insurance costs, filing fees for quarterly taxes and W2s.
<b>Contractual</b>	\$3,000.00			<b>\$3,000.00</b>	ADRC% of annual audit, ADRC translator services, NE4a membership
<b>TOTAL</b>	<b>\$203,550.00</b>			<b>\$203,550.00</b>	

## 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.



Enter Applicant  
Name

Date

Applicant Name			Units of Service				
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 (%)
<b>ADRC Direct Services</b>							
40	<a href="#">Information &amp; Referral</a>	Contact	1,312.00	1,312	2,624	3,500	33.38%
41	<a href="#">Options Counseling</a>	Hour	99.00	99	198	200	1.01%
42	<a href="#">Transitional Options Counseling</a>	Hour	56.50	57	113	120	6.19%
43	<a href="#">Benefits Assistance</a>	Hour	720.25	720	1,441	2,000	38.84%
44	<a href="#">Mobility Training</a>	Hour	2.50	3	5	5	0.00%
45	<a href="#">Point of Entry</a>	Hour			-		0.00%
46	<a href="#">Unmet Service Needs</a>	Hour			-		0.00%
47	<a href="#">Home Care Provider Registry</a>	Hour			-		0.00%

**FY 2025 BUDGET - ADRC**

<b>Applicant Name - Initial Pro</b>						
<b>ADRC SERVICE</b>						

[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
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**COST CATEGORIES**

1. Personnel	\$45,000	\$25,000	\$6,000	\$105,000	\$500	
2. Travel		\$400		\$500		
3. Print & Supp.	\$1,000	\$2,000		\$4,500		
4. Equipment						
5. Build Space	\$1,000	\$1,000		\$1,000		
6. Comm. & Utilit.	\$500	\$250		\$500		
7. Other	\$1,000	\$1,000		\$1,000		
8a. Raw Food						
8b. Contractual	\$1,000	\$1,000		\$1,000		
<b>9. GROSS COST</b>	<b>\$49,500</b>	<b>\$30,650</b>	<b>\$6,000</b>	<b>\$113,500</b>	<b>\$500</b>	<b>\$0</b>

**FUNDING**

17b. CASA ADRC	\$11,500	\$18,950	\$4,000	\$41,050	\$500	
17c. MAC Return	\$38,000	\$11,700	\$2,000	\$72,450		
<b>19b. TOTAL SUA COST</b>	<b>\$49,500</b>	<b>\$30,650</b>	<b>\$6,000</b>	<b>\$113,500</b>	<b>\$500</b>	<b>\$0</b>
21. CM Client Responsibility						

Projected Units	3,500.00	200.00	120.00	2,000.00	5.00	
Gross Cost (9) Per Unit	\$ 14.14	\$ 153.25	\$ 50.00	\$ 56.75	\$ 100.00	
Match (16b) Per Unit	\$ -	\$ -	\$ -	\$ -	\$ -	
Total SUA (19b) Per Unit	\$ 14.14	\$ 153.25	\$ 50.00	\$ 56.75	\$ 100.00	
CM (19) Per Unit						

**FY 2025 BUDGET - ADRC**

**Proposed Budget**

[Taxonomy #, Service, Unit Measure]	46. Unmet Service Needs	47. Home Care Provider Registry	Area Plan Admin	ADRC TOTAL	TOTAL
<b>COST CATEGORIES</b>					
1. Personnel			\$3,300	\$184,800	\$184,800
2. Travel			\$100	\$1,000	\$1,000
3. Print & Supp.				\$7,500	\$7,500
4. Equipment				\$0	\$0
5. Build Space				\$3,000	\$3,000
6. Comm. & Utilit.				\$1,250	\$1,250
7. Other				\$3,000	\$3,000
8a. Raw Food			\$0	\$0	\$0
8b. Contractual			\$0	\$3,000	\$3,000
<b>9. GROSS COST</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,400</b>	<b>\$203,550</b>	<b>\$203,550</b>
<b>FUNDING</b>					
17b. CASA ADRC			\$2,500	\$78,500	\$78,500
17c. MAC Return			\$900	\$125,050	\$125,050
<b>19b. TOTAL SUA COST</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,400</b>	<b>\$203,550</b>	<b>\$203,550</b>
21. CM Client Responsibility					

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

**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.

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