

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 change from previous year's plan. *WCNAAA's Public Benefits Specialist will be directly responsible for coordinating the day-to-day tasks of the ADRC program under the direct supervision of the Executive Director. Public Benefits Specialist successfully assists clients with applying for benefits through Medicare, she has been in this position since December 2021 and has been coordinating the ADRC program since its conception in July, 2023. The Public Benefits Specialist is interested and committed to helping people in our area apply for other benefits available to them. The Public Benefits Specialist will continue to be responsible for the SHIP, SMP, and Legal programs.*
2. Describe how this program will operate within your organizational structure. How will the ADRC seek guidance and perspective that benefits individuals experiencing disabilities?

Updated to remove collaboration with Fritz & O'Hare. *The ADRC program will be operated by Public Benefits Specialist who reports directly to the Executive Director. WCNAAA plans to participate with the Ne4A and follow the ADRC plan of operations for ADRC training and support. The training will include, but not be limited to, the goals and objectives of the program and trends in resources and benefits available to the public. The Public Benefits Specialist and Executive Director will conduct an orientation program for all ADRC personnel. The Public Benefits Specialist will participate in any training provided by the Nebraska Health and Human Services State Unit on Aging, as well as seek guidance from the community in learning resources available in our service area.*
3. Describe the proposed staffing of the ADRC. Include all positions, FTEs, contracted labor, and responsibilities.

Updated process to add Programs Assistant. *The Public Benefits Specialist is a 1.0 FTE, a percentage of their time, according to their most recent time study will be allocated to ADRC; this position oversees the program. The Programs Assistant is a 1.0 FTE, a percentage of their time, according to their most recent time study will be allocated to ADRC; this position fills in and takes overflow appointments that the Public Benefits Specialist cannot take. The Intake & Referral personnel, is a 1.0 FTE, a percentage of their time, according to their most recent time study will be allocated to ADRC. A percentage of administrative personnel's costs will be allocated to ADRC according to most recent time study.*
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 change from last year's plan. *The ADRC's physical location will be located within WCNAAA's only physical location, North Platte Nebraska which is situated in the middle of WCNAAA's service area. Our office location is all on one level and spacious enough to accommodate*

individuals with disabilities. WCNA AAA receptionist is able to see anyone coming in and helps them through the doors when needed. The ADRC program will also give assistance via telephone. Arrangements can be made for the ADRC staff person travel to see clients within 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. **No change from previous year's plan.** *WCNA AAA has been using the SUA's data entry practices for entering data into PeerPlace since PeerPlace was adopted by the Nebraska SUA. WCNA AAA is very comfortable with utilizing PeerPlace as it is its primary data entry software.*

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 change from previous year's plan.** *WCNA AAA has access to a language line to interpret different languages, we also have extensive experience working with those with disabilities and different cultures. WCNA AAA staff have received training in Diversity and Inclusion and this type of training will be given regularly into the future.*

7. Describe how the ADRC will ensure that its services are objective, unbiased, and in the best interest of the client. **Updated to encompass Program Assistant.** *Our Public Benefits specialist and Programs Assistant have signed contracts at the beginning of their employment that states they will provide objective information to their clients and they have been loyal to their contracts. All other staff providing ADRC services have an updated job description that includes providing objective, unbiased information to clients.*

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

Updated to remove collaboration with Fritz & O'Hare. *WCNA AAA is a member of Ne4A which allows the agency to collaborate with AAA's all across the State of Nebraska who also participate in ADRC. The West Central Nebraska Area Agency on Aging's Intake and Referral staff shall maintain a comprehensive list of information of available public and private resources that include both formal and informal community-based services and institutions for use in referral activities of the ADRC Unit. The Agency's Resource Developer coordinates with the Nebraska Department of Health and Human Services Resource Development team in the recruitment and retention of providers. It is the goal of the West Central Nebraska Area Agency on Aging's ADRC Unit that every client will have access to formal and/or informal services that best meet their level of need.*

A comprehensive list of over 150 public and private resources is available upon request.

9. Describe how the agency will implement a quality assurance process.

No change to last year's plan. *Quality Assurance review of Benefits Assistance ADRC client files will be completed on a quarterly basis. WCNA AAA will create a review tool that assures adequate timing and follow up of client needs.*

Random selection of ADRC files will be done by designated qualified staff of West Central Nebraska Area Agency on Aging, after being provided with a list of recent clients for the previous quarter. 10% of client files will be selected for review by the Executive Director.

Based on the findings obtained during the review process, the director will determine the follow up action that may be needed, per the established guidelines and protocols. The ADRC staff may be required to:

- 1. Be counseled with files and duties monitored closely by the director*
- 2. Be re-educated in specific area of issue if needed*

Quality Assurance review of Information and Referral ADRC calls will be done monthly when I&R staff submit their call log for input into PeerPlace. When call log is submitted, CHOICES supervisor will review each call and determine if it is III-E, III-B, or ADRC eligible.

B. Service Provision (30 Points)

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 change from previous year's plan.** *WCNA AAA has set aside money in the budget for printing, marketing and outreach during the first year. WCNA AAA will utilize its list of newspapers that are available in the West Central region for marketing of ADRC services. Marketing and outreach will also be done through West Central's 21 senior centers and senior meal sites and material will be sent to hospitals, nursing homes, and assisted living facilities in our region. Isolated individuals can be reached through flyers going out to home delivered meal clients. WCNA AAA's Facebook page will be utilized to market new ADRC services. Marketing print of the new ADRC services will also go out to current clients.*

10.

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

No change from previous year's plan. *WCNA AAA is a community-trusted source of information. Aging individuals and their families often contact us for information on the available resources in our service area, and we provide them with comprehensive information on how to obtain these resources. WCNA AAA continuously collaborates with other entities within our service area to learn about programs available to our population. WCNA AAA would like to formally offer a full range of information and resources to the people in our service area through the ADRC program.*

12. Describe how the ADRC will provide Options Counseling services.
WCNAAA is not planning on providing Options Counseling services through ADRC at this time.
13. Describe how the ADRC will provide Transitional Options Counseling services.
WCNAAA is not planning on providing Transitional Options Counseling services through ADRC at this time.
14. Describe how the ADRC will provide Benefits Assistance.
No change from previous year's plan. *Our service area is very rural, and our clients are primarily aging adults who sometimes tend not to have experience with computers or access to the internet. Our Public Benefits Assistant has noticed an increasing demand in our clients with needing help filling out Medicaid applications and applying for SNAP or LIHEAP benefits. DHHS has moved towards electronic applications, and although a person can still get a paper application from our local DHHS office, they are not aided in filling it out. WCNAAA would like to offer benefits assistance to the aged and disabled people in our service area to help them understand and apply for benefits for which they may qualify.*
15. Describe how the ADRC will provide Mobility Training.
WCNAAA is not planning on providing Mobility Training services through ADRC at this time.
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 change from previous year's plan. *WCNAAA ADRC is able to refer individuals directly to our Care Management or Medicaid Waiver program for home care if they choose to use our agency for home care. WCNAAA also has a list of home care providers in the West Central region for individuals to choose from. When seeking assistance, individuals will always be given their right to choose; when signing up for services through WCNAAA, all clients sign that they have received and reviewed an SUA approved letter outlining their rights and responsibilities.*
17. Describe how the ADRC will provide individual and systems advocacy. This includes information about client rights and assistance with exercising those rights.
No change from previous year's plan. *The ADRC staff will be the client's advocate in the ADRC Program. Our clients depend on us to search out and protect their rights and to help them with their needs. Dignity and independence are our primary goal for them as long as it is safe for them to remain in their current situation; otherwise, we need to assist them in exploring their other options.*
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 change from previous year's plan. *WCNAAA has an extensive Emergency Response plan, any ADRC clients and staff will participate in the current WCNAAA Emergency Response plan. Plan will be attached to this application. As with all WCNAAA staff, ADRC staff will have the equipment to work remotely if emergency warrants that situation.*

Budget Narrative – West Central Nebraska Area Agency on Aging

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	\$0.00	\$66,729.00		\$66,729.00	Amanda Barkmeier, current Public Benefits Specialist, ADRC project director. Amanda is a 1.0 FTE, 34% for FY 24-25 according to her most recent time study. Vicki Gleason, current Programs Assistant, is a 1.0 FTE, 30% for FY 24-25 according to her most recent time study Deb, current Intake & Referral personnel, according to her most recent time study 19% of her 1.0 FTE goes into ADRC. This total also includes approximately 6.4% of the admin.'s personnel costs according to most recent time study.
Travel	\$0.00	\$1,000.00		\$1,000.00	Cost for any travel that the Public Benefits Specialist or Program Assistant may need to do to accommodate clients who cannot travel to the office. This will also include 6.4% of admin. Travel costs according to the most recent time study.
Print & Supp.	\$0.00	\$410.00		\$410.00	Costs to advertise for program and services offered in region.
Equipment	\$0.00	\$600.00		\$600.00	Estimating approximately 6.4% of the equipment expenses for the agency will be allocated to the ADRC program, this will be verified through time studies and a new cost allocation plan when program is up and running. This cost will also include cost to replace Public Benefits Specialist and Intake and Referral personnel's computers according to their cost allocation from the most recent time study.
Build Space	\$0.00	\$3,714.00		\$3,714.00	6.4% of the building space will be allocated to the ADRC program, this will be verified through time studies and a new cost allocation plan when program is up and running.

Comm. & Utilt.	\$0.00	\$1,375.00		\$1,375.00	6.4% of the utilities and communication expenses will be allocated to the ADRC program, this will be verified through time studies and a new cost allocation plan when program is up and running.
Other	\$0.00	\$1,400.00		\$1,400.00	6.4% of expenses of any leases, advertising, insurance, professional fees, dues and publications, or miscellaneous expenses incurred according to most recent program cost allocation study. The percentage will be verified through time studies and a new cost allocation plan when program is up and running.
Contractual	\$0.00			\$0.00	No contracting this FY.
TOTAL	\$0.00	\$75,228.00		\$75,228.00	

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				
Taxonom y#	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	473	473	946	950	0.42%
41	Options Counseling	Hour			-		0.00%
42	Transitional Options Counseling	Hour			-		0.00%
43	Benefits Assistance	Hour	29	50	79	85	7.26%
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
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COST CATEGORIES

1. Personnel	\$22,648			\$44,081		
2. Travel				\$1,000		
3. Print & Supp.	\$100			\$310		
4. Equipment	\$100			\$500		
5. Build Space	\$1,238			\$2,476		
6. Comm. & Utilit.	\$508			\$867		
7. Other				\$1,400		
8a. Raw Food						
8b. Contractual						
9. GROSS COST	\$24,594	\$0	\$0	\$50,634	\$0	\$0

FUNDING

17b. CASA ADRC				\$25,200		
17c. MAC Return	\$24,594			\$25,434		
19b. TOTAL SUA COST	\$24,594	\$0	\$0	\$50,634	\$0	\$0

21. CM Client Responsibility

Projected Units	950.00	0.00	0.00	85.00	0.00	
Gross Cost (9) Per Unit	\$ 25.89			\$ 595.69		
Match (16b) Per Unit	\$ -			\$ -		
Total SUA (19b) Per Unit	\$ 25.89			\$ 595.69		
CM (19) Per Unit						

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			\$66,729	\$66,729
2. Travel			\$1,000	\$1,000
3. Print & Supp.			\$410	\$410
4. Equipment			\$600	\$600
5. Build Space			\$3,714	\$3,714
6. Comm. & Utilit.			\$1,375	\$1,375
7. Other			\$1,400	\$1,400
8a. Raw Food			\$0	\$0
8b. Contractual			\$0	\$0
9. GROSS COST	\$0	\$0	\$75,228	\$75,228
FUNDING				
17b. CASA ADRC			\$25,200	\$25,200
17c. MAC Return			\$50,028	\$50,028
19b. TOTAL SUA COST	\$0	\$0	\$75,228	\$75,228
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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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	
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