



# Iron County Aging Plan FY 2022–2024



**Wisconsin Department of Health Services  
Division of Public Health  
Bureau of Aging and Disability Resources  
Office on Aging**

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## **Executive Summary**

Aging Services in Iron County is integrated within the Aging and Disability Resource Center (ADRC) of the North – Iron County Branch Office. We strive to assure that older adults in the community can realize their full potential to participate and have access to all areas of community life.

Our Mission: provide a one stop source of information and assistance for older adults by advocating for and connecting them with resources and services that enable them to live as independently as possible. Aging works diligently to ensure this mission is met by advocating for, expanding, coordinating, and implementing programs and services designed to improve and/or maintain the quality of life for persons sixty years of age and older throughout Iron County.

### **Aging Plan Emphasis for 2022-2024:**

- **Will be to not only maintain the current programs and services we offer but to also provide and/or expand:**
- **Opportunities for older adults in Iron County to be actively involved and comfortable with speaking for themselves and voicing interest regarding community initiatives.**
- **Expansion of Elder Nutrition Programs to grow participation and have customer choice on program delivery of services.**
- **Expansion of transportation services will be provided to seniors to access recreational events and boarder transportation territory.**
- **Additional coordinated activities that will continue to enhance services in support of caregivers.**
- **Continuation of disease prevention and health promotion activities and services to help with socialization and loneliness.**
- **Assistance with local priorities of importance to seniors.**
- **Ensure our aging programs are welcoming and all-inclusive to all groups, races and ethnic backgrounds.**

## **Importance of Community Engagement**

Engagement with community partners, seniors who access our current services and outreaching to new community members we can learn what service gaps Iron County is facing and allowed for the seniors and community partners to identify in their own words what needs are evident in Iron County. Using social media, survey on-line resources and paper surveys we received feedback that seniors and caregivers requested more access and services for transportation, home-related related services to lighten the burden on caregivers and senior, more education on Medicare resources and overall evidence that more outreach of what services are available currently to seniors and caregivers in Iron County.

## **Community Challenges & Needs**

The growing aging population in Iron County poses its own set of challenges as there is not enough programming, funding, or agencies to meet the demands and needs of the aging population. There continues to be a lack of resources for seniors for housing, nursing home needs, there is no assistive living facilities in the county and seniors' health related needs are often complex. There has been some great emphasis with community partners like UW-Extension, NICER group, Iron Belle Trail authority who are creating focus on staying active, engaging in the arts, and promoting healthy aging throughout the lifespan in the community. Our goals are to partner with these great community agencies, formulate proactive services to help adults stay active in the community, outreach to more adults on current services all with the hope that older adults know where to call when they need something and avoid crisis level services.

## **Aging Unit- Long Path Vision**

What is the long path vision for Iron Counties aging programs? It's evident in today's age that seniors are living longer and staying more active and healthier long into the late stages of life. Today's older adults are looking for new services that are easily accessible, save time and keep them connected with friends and family. Older adults are using social media platforms to socialize and communicate with family. Outreach and advertising continue to change with increased older adults using technology to get their news, order groceries, online banking, and medical information. The future of aging plans is changing, and we need to adapt to the new wave of aging adults who want to remain active in their community, stay connected with technology and model our services around their desires. Iron County has a good balance of older adults using technology however some are still learning or prefer to keep things simpler with use of radio and newspaper media. Providing to both audiences we need to ensure we are meeting the needs of each generation. Forming new relationships with community partners in Iron County will help to meet more needs of older adults and stay up to date with new programming. Long range goals will continue to emphasis the importance of community engagement and choice within all aging programs here in Iron County.

## **Leadership of the Aging Unit- Iron County**

Iron County's Aging Unit leadership is unique with the integration of the ADRC and Aging Unit. The manager oversees the operations and service delivery of both the ADRC and Aging Services. Knowledge of all services within the ADRC and Aging allow for better community service delivery as it provides one- stop location for all services to its customers. The manager collaborates with Iron County Aging Advisory Committee, Nutrition Advisory Committee, Hurley Senior Center Board and the Human Service board for all final aging related budget approvals/decisions. Having the support of these committees is vital to ensure our services continue to improve each year, meet the needs of older adults and are financially sustainable.

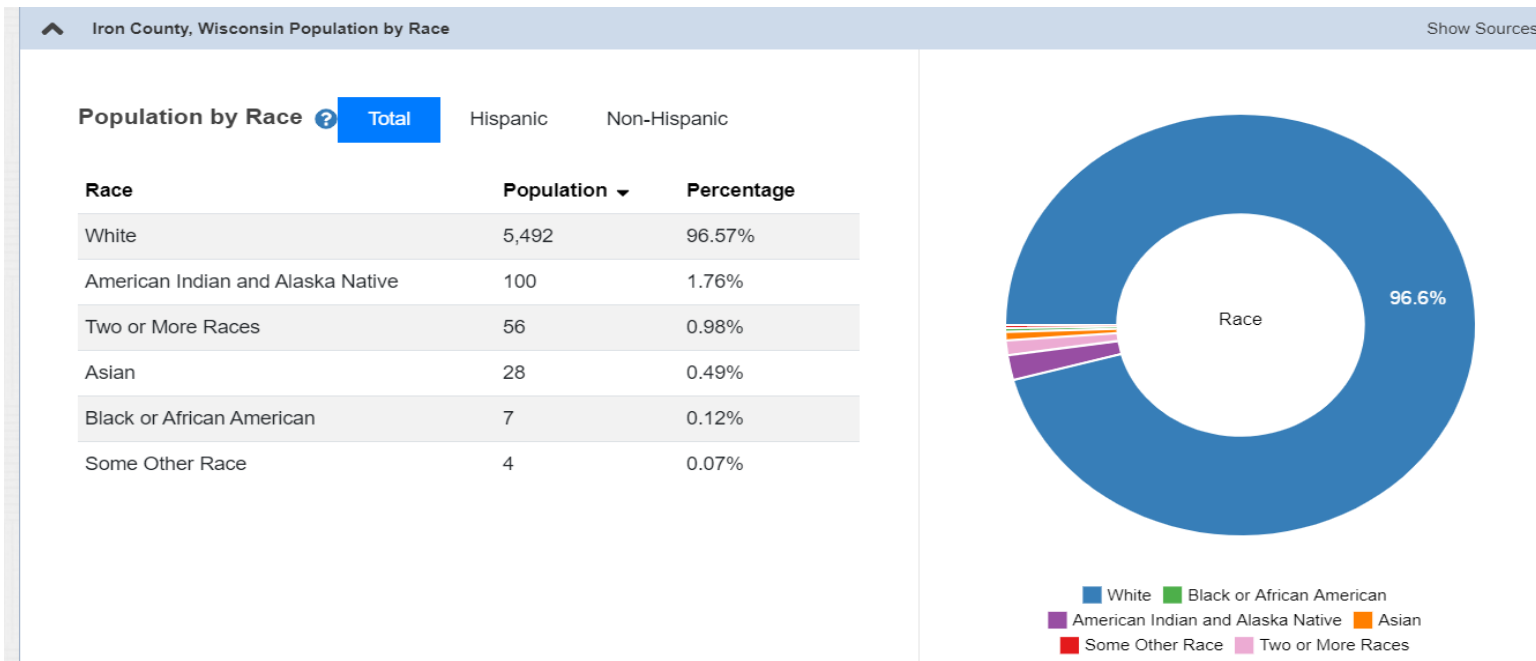
## Context

The umbrella of aging services under the ADRC of the North-Iron County branch continues to strive to offer older adults in Iron County opportunities for growth, access to community resources both locally and statewide and continued means to stay independent as long as possible.

According to the 2020 Census, Iron County's population was 5,687 with 32.1% of 65 and older adults in our county. Below provides a breakdown of population by race.

[U.S. Census Bureau QuickFacts: Iron County, Wisconsin](#)

**Graph Source:** [Iron County, Wisconsin Population 2021 \(worldpopulationreview.com\)](#)



Iron Counties aging population continue to be the highest percentage state-wide making it vital for the county to offer an amenity of aging and disability services to meet their

needs. Adults 55 and older will make up 52.6% and Adults 60 and older at 46.0% of the population by 2040. These projections are vital to recognize as over half the population will be older adults who need services and even more essential to keep young families in Iron County to help care for these individuals as they age.

	Ages 55 and Older	Ages 55 and Older	Ages 55 and Older	Ages 55 and Older	Ages 55 and Older	Ages 55 and Older	Ages 55 and Older	% Ages 55 and Older	% Ages 55 and Older
County	2010	2015	2020	2025	2030	2035	2040	2010	2040
Iron	2,532	2,710	2,920	3,070	3,130	3,050	2,850	42.8%	52.6%

	Ages 60 and Older	Ages 60 and Older	Ages 60 and Older	Ages 60 and Older	Ages 60 and Older	Ages 60 and Older	Ages 60 and Older	% Ages 60 and Older	% Ages 60 and Older
County	2010	2015	2020	2025	2030	2035	2040	2010	2040
Iron	2,024	2,110	2,395	2,645	2,760	2,680	2,495	34.2%	46.0%

Source: Wisconsin Department of Human Services- Division of Long- Term Care P-00138A

[Demographics of Aging in Wisconsin | Wisconsin Department of Health Services](#)

With the large population of aging needs comes challenges that include caregiver burnout, lack of caregiver agencies for respite, home care needs and caregiver type jobs to meet the demand. In addition, there will continue to be growing need for more affordable senior housing, nursing facilities and assistive living communities. With the complexity of aging both locally and state-wide it is essential that more federal and state funding is needed to provide the necessary services.

Since the pandemic of COVID-19 the increased need for caregiver services has significantly impacted seniors in Iron County. With only one home health agency in Iron County, the demand for services over exceeded the agency’s ability to offer services and posed the challenge of putting older adults on waiting lists for home health services and more pressure on the ADRC of the North- Iron County branch to assist caregivers and their loved ones with services.

Older adults are asking for more assistance with their home care needs. Basic housekeeping needs such as cleaning, vacuuming, laundry and outdoor care like racking and snow shoveling continue to be requested by seniors in our community. Many living on limited incomes, cannot afford to private pay for home health services to provide this service or the service has not been available in our county.

Iron County has made great strides with their aging services since the integration of Aging and the ADRC of the North- Iron County. The integration has provided an increased ability to offer more aging services to Iron County residents. Increased opportunities in transportation have allowed for older adults to connect to bordering counties with the counties aging and disability transportation services. As the program continues to grow, the need for outreach continues as the community is still learning what is available for transportation services in Iron County. The demand for medical trips, shopping, banking, and recreational needs continues to be desired and future expansion of transportation will continue to grow with knowledge, participation and need for transportation as seniors continue to age.

The senior nutrition program in Iron County continues to offer older adults an avenue of social connection and access to nutritious meals. Iron County offers older adults 5 different locations in Saxon, Iron Belt, Mercer, Springstead and Hurley to come together for a meal but also learn about ADRC services, statewide advocacy services and support. The nutrition sites offer more than just a meal but also a point of contact for older adults to learn about community resources. In addition to our meal sites, we offer home delivery to over 150 homebound seniors throughout the county. Though these seniors are homebound, aging services are also provided to them via communication of flyers, personal follow up calls and check-ins to ensure their needs are also being met.

The graph below represents Title III programs by Race/Ethnicity in Iron County. Those who participated in the Older American's Act programs represented are similar to Iron County's population statistics. With 95.7% Congregate Meal participants identifying as White/Non-Hispanic. Though the populations of Native Americans, Hispanics, African Americans, and Asians are quite low, capitalizing on these groups to ensure they have access and are aware of these services need to be acknowledged and marketed to avoid any service gaps that we may have. Reporting accurate data is important to accurately see what service gaps are in the county. Therefore, Iron County continues to work on improving its reporting of Title III services. Marketing to all ethnic groups and examine each program and if we are properly campaigning, advertising, and outreaching to all groups equally.

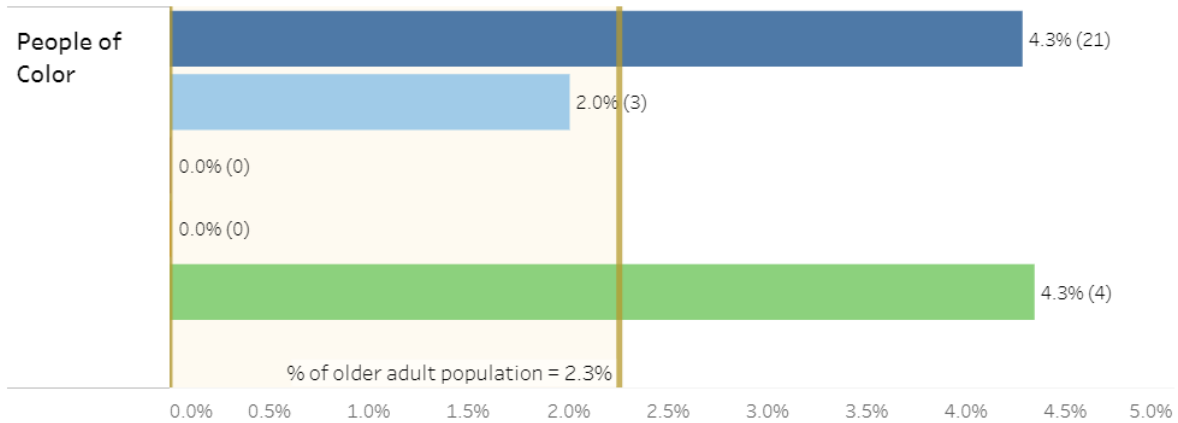
Select County or Tribal Agency  
 Iron County

**Legend**

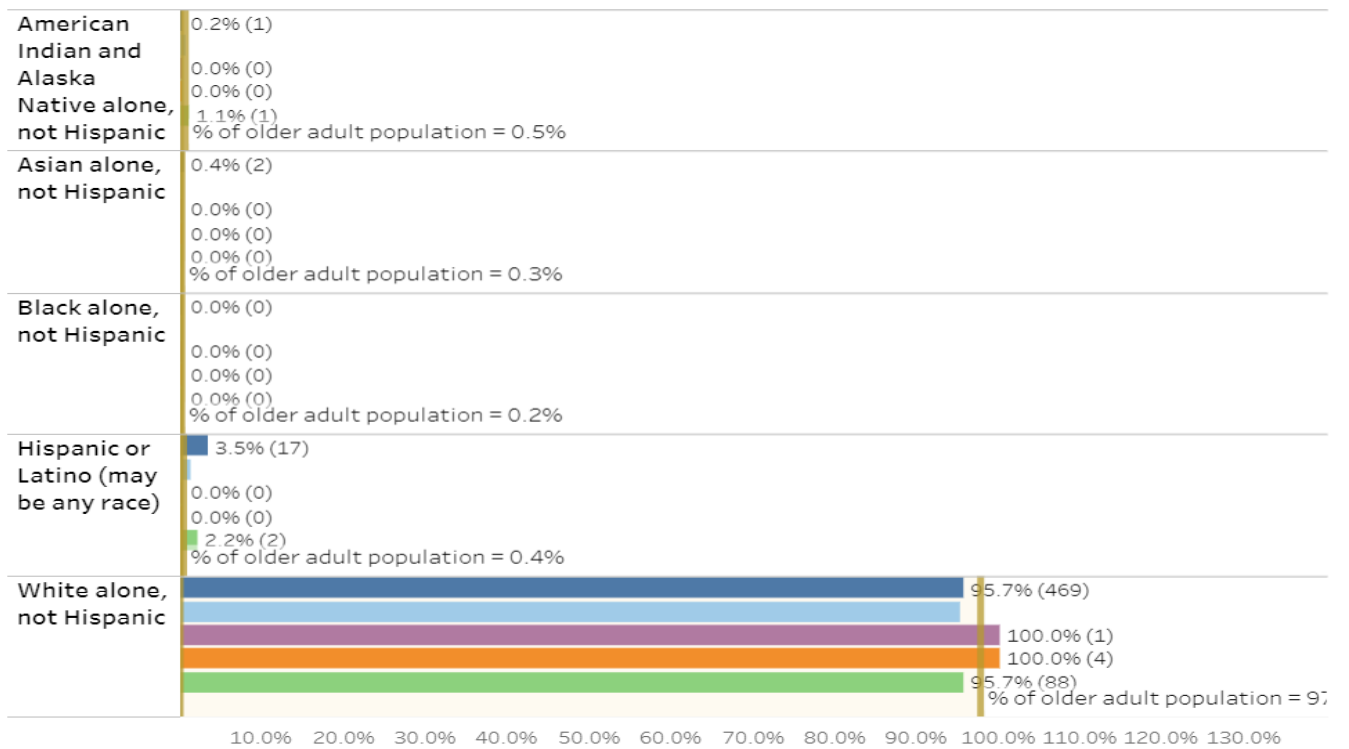
- Congregate Meal
- Home Delivered Meal
- Evidence-Based Health Promotion
- National Family Caregiver Support Program
- Elder Benefits Specialists

Hover the cursor over chart elements for description of statistics.

The proportion of program participants of color compared to their proportion in the Iron County older adult population



Select Race/Ethnicity to view  
 (All)





Since the pandemic, the way we communicate with seniors changed drastically. Our meal sites once used as communication centers for information, now had to switch to other platforms to outreach to our communities' seniors. Though the pandemic caused a lot of negative outcomes, it did create positive changes in which our aging services had to think creatively to outreach to older adults. This allowed our services to implement new media platforms to reach older adults and the community. Outreach of our services now includes ADRC of the North- Iron County Facebook page, Fall/Winter and Spring/Summer ADRC newsletter, weekly and monthly flyers and virtual workshops. Moving forward with aging services, these new platforms of communication and technology will continue with hopes to reach more community members and increased participation in Iron County.

Iron County's 2022-2024 Aging Plan is comprised of community partners needs and a small snapshot of older adults surveyed in Iron County and their desires. To make our plan successful, Iron County continues to work with community partners such as the Iron County Health Department, Highline Corporation, UW Extension, Aspirus Grandview, Avanti Home Health Services, long-term care agencies Inclusa and IRIS, law enforcement, Hurley K-12 School, DOVE (domestic violence escape), and local nursing homes in Iron County. We are always willing to collaborate with any agency that will increase services for the betterment of older adults Iron County.

## **Community Involvement in the Development of the Aging Plan**

View Appendix 1 and Appendix 2- Community Engagement Report

Iron County retrieved community engagement through surveying our senior populations who participate within the senior nutrition program, Aging Advisory Committee Board & Nutrition Advisory Board member's input. An Electronical survey was also provided using social medical platform Facebook via the ADRC OF THE NORTH-Iron County Facebook Page and Hurley Senior Center.

The needs compiled from both surveys, reflect the same priority needs of Iron County with Transportation, Home Care needs/ Lawn/ Snow care and Technology with the highest requested needs in Iron County with some interest also with Medicare/Prescription needs and Socialization also reported as important needs in Iron County.

## **Public Hearing Requirements**

Please provide a brief summary of the hearings and input from community members.

Use the [Public Hearing Report](#) to list the dates, times, locations, and numbers of people in attendance at public hearings. The report should include a summary of public comments and explain modifications made to the draft version of the plan as a result of input collected during the public hearing. Attach [Public Hearing Report\(s\)](#) to the appendices of the aging unit plan.

## Goals for the Plan Period

### Goal Template

<b>Focus area: Title III B Supportive Services</b>	<b>Due Date</b>
<b>Goal statement: To ensure Seniors have access to alternative transportation options with emphasis on social/recreational events.</b>	12/31/2024
<p><b>Plan for measuring overall goal success – How will you know that you have achieved the results you want? Use data.</b></p> <p>Pre and Post Survey Transportation Participants on Annual Basis to identify overall satisfaction of program and identified access to transportation in Iron County.</p> <p>Transportation Service Data Comparison to identify what options have improved from 2021 to 2024.</p>	

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure (How will you know the strategies and steps have been completed?)</b>	<b>Due Date</b>
<b>Strategy 1: Inform community partners and older adults about what transportation are currently available</b>		
Action step: Set up meetings with community partners to identify current transportation availability and identify new needs	Meetings scheduled and completed	2/28/22
Action step: Marketing Campaign to community on transportation services.	Flyer handouts provided to all HD/Congregate members, ADRC clients, community partners, etc. Advertising completed on Facebook ADRC page and local newspaper.	3/31/22
Action step: Survey caregivers/ADRC clients and nutrition members on what alternative transportation needs they would like to see.	Create Survey and disperse completed. Use data to determine options of alternative transportation services/ social events	6/30/22
<b>Strategy 2: Provide Alternative options for access to food.</b>		
Action step: Coordinate drivers to offer more alternative options	Hold Meeting with Transportation Drivers on new	8/1/22

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
	programming. Meeting Complete.	
Action step: Set up transportation for weekly trip to Montreal & Mercer food pantry	Outreach Flyers/ Facebook and Presentations this new available service to community partners/ senior housing complex/ nutrition members	9/1/22
Action step: Provide technology seminar on using Walmart Pick up program and using Aging transportation to pick up their groceries.	Technology Seminar- on Walmart grocery pick up. Completed	11/1/22
Action Step: Provide transportation to Farmer's Market During Summer Months	Outreach of service completed. Program Implemented	5/1/23
<b>Strategy 3: Create Recreational Options for Seniors</b>		
Action step: Identify and create a Spring/Summer and Fall/Winter calendar of social events available for seniors to participate in.	Calendar present on Facebook and updated monthly.	4/1/22
Action step: Outreach to seniors and community partners new social/recreational events available	Flyer handout with calendar and available options	5/1/22
Action step: Implement New Weekend transportation option	Program implementation and use of program- Annual survey transportation participants. Annual Survey Completed	6/1/22-24
<b>Annual progress notes</b>		

<b>Focus area: Title III-C Nutrition Program &amp; Customer Choice &amp; Community Engagement</b>	<b>Due Date</b>
<b>Goal statement: Seniors in Iron County will have increased access and options for healthy food and socialization.</b>	12/31/2024
<p><b>Plan for measuring overall goal success – How will you know that you have achieved the results you want? Use data.</b>          New meal options are offered, the first year a baseline will be established. The goal will be to increase the number of meals and # of new attendees by 5% annually from baseline.</p>	

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure (How will you know the strategies and steps have been completed?)</b>	<b>Due Date</b> <b>12/31/23</b>
<b>Strategy 1: Collect input from Nutrition Advisory Council (NAC) current Elder Nutrition program participants, older adults in the community that may not be attending a dining site, etc.</b>		
Action step: Develop a community survey to evaluate the options and potential pop-up new locations desired in Iron County. Surveys will be distributed it in a variety of ways, including social media, senior meals.	Community input from at least 40 people will be obtained and evaluated.	3/31/22
Action step: Add to NAC agenda for input and task them with doing 1 on 1 interview to determine interest.	Each NAC member will collect input from at least 3 people.	3/31/22
<b>Strategy 2: Determine the incidence of food insecurity in the county.</b>		10-1-22 to 3-31-2022
Action step: Add 2 questions food insecurity screen to initial and annual reassessment ENP registration form.	2 questioned added to screen completed	
Action step: Use information from screen to identify gaps and add program/support to fill the gaps.	Review data from screen and determine next steps for program area additions to fill gaps.	
<b>Strategy 3: Work with cooks and dietitians to develop seasonal menu</b>		

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b> <b>12/31/23</b>
<b>options that meet the meal pattern and nutrient analysis</b>		
Action step: Create 5-8 breakfast and Dining at 5 Meal Options	Menus created	3/31/22
Action step: RD will review menus, adjust as needed, and approve.	Menus evaluated by RD, adjustments made as necessary	5/1/22
Action step: Utilize meal cost tool to determine the full cost for each meal and meal site and work with Nutrition Advisory Council to determine suggested contribution for each meal.	NAC determines suggested contribution for B, L, and Dinner	5/1/22
Action step: Determine staffing patterns to see if additional staff are needed and the cost.	Director to work with Aging bookkeeper and site managers to determine the need and cost to implement new options.	5/1/22
<b>Strategy 3: Determine what meal options will be added (Breakfast, Dining at 5, Pop-up locations, etc.</b>		
Action step: Establish implementation dates/locations and hours.	Roll-out plan reviewed and approved by NAC and governing body.	7/1/22
Action step: Create and implement a marketing plan	New Meal options begin with participation.	9/1/22-ongoing
Action step: Determine what data to collect, which feedback tool(s) to use	Conduct a satisfaction survey and elicit feedback at least twice a year.	7/1/23
Action step: Evaluate date, program income, participation rate, staffing patterns, etc. to determine sustainability	Develop sustainability plan	12/31/23
<b>Annual progress notes</b>		

<b>Focus area: Title III-D Health Promotion &amp; Community Engagement</b>	<b>Due Date</b>
<b>Goal statement: Reduce social isolation and loneliness by offering opportunity for connecting with others</b>	12/31/2024
<p><b>Plan for measuring overall goal success – How will you know that you have achieved the results you want? Use data.</b></p> <p><i>Use of comparison data from Pre and Post Surveys- Identifying if participants who accessed new programs felt that the new programs helped to combat social isolation and reduce feelings of loneliness.</i></p>	

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure (How will you know the strategies and steps have been completed?)</b>	<b>Due Date</b>
<b>Strategy 1:</b> Implement walking with ease program for older adults		
Action step: Outreach to local senior housing complexes, community partners and nutrition members the WWE program availability	Schedule with senior housing complex a meeting. Completed all forms of outreach and flyers dispersed to community.	3/1/22
Action step: Organize location for WWE locations and scheduled times for program to occur.	Arrange and set locations with times class will be	4/28/22
Action step: Implement WWE program	Class implementation completed and participation. Pre and post survey completed.	6/1/22-9/1/22
<b>Strategy 2: Identify social isolation projects to implement at senior housing complexes</b>		
Action step: Set up time to visit senior complexes and survey those in attendance in what health-based activities they would be interested in.	Schedule meetings and get visit approved from landlord/building manager	9/1/22
Action step: Create survey to gather data on interested topics.	Create and disperse survey completed survey's	9/1/22
Action step: Gather Data from survey to determine what topics older adults identify as desired need.	Compile data to determine ideas and identified staff that will provide each topic and time frames	9/30/22

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
Action step: Implement ideas and present them at local housing complexes	Program implementation with variety of topics presentation at housing complexes	11/1/22-2023
<b>Strategy 3: Identify social and recreational activities in Iron County that would interest older adults</b>		
Action step: Identify community partners that have programs of interest in the community.	Set up meetings with identify community agencies such as UW extension, NICER group, chamber	1/22
Action step: Create listing of social and recreationally activities in the community	List completed	3/22
Action step: Post information on social media, semi annual newsletter etc.	Post information and flyer to all nutrition members and senior housing complexes, community partners, churches, etc.	4/22
Action step: Updated Quaterly with community events	Quarterly update calendar of events	22-24 updated Quaterly
<b>Annual progress notes</b>		

<b>Focus area: Title III-E Caregiver Support</b>	<b>Due Date</b>
<b>Goal statement: Caregivers and older adults will have access to community-based home chore services. (home/chore services will include but not limited too light housekeeping, repair services, lawn care aka. mowing, racking and snow removal)</b>	12/31/2024
<b>Plan for measuring overall goal success – <i>How will you know that you have achieved the results you want? Use data.</i></b>  Program Implementation and 10 caregivers are utilizing the new programs offered.	

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
<b>Strategy 1: Survey older adults in Iron County and Caregivers specific needs related to home repairs, housekeeping, and lawn care</b>		
Action step: Create Survey	Survey completed	3/1/22
Action step: Disperse Survey to all HD, Congregate and Caregivers under NFCSP/AF CSP, community partners and churches in Iron County.	Data collection from survey completed	4/1/22
Action step: Use Data from Survey to help recruitment of volunteers	Formulate List of Needed Home Chore Services that Volunteers could assist with. List Complete	5/1/22
<b>Strategy 2: Hold Volunteer Recruitment for development of program</b>		
Action step: Outreach for Volunteers via social media, community spread flyers, newspaper etc.	Create flyers and post for Facebook/Community/Article for newspapers	7/1/22
Action step: Hold Volunteer Recruitment Fair at 3 locations in county- Include volunteer application along with background check form	Hold Volunteer Fairs- At Identified locations.	8/1/22
Action step: Gather list of interested Volunteers with name, contact information	List of Volunteers with completed applications and background checks	8/1/22
Action step: Provide training with Volunteers on safety, red flags- seniors, reporting	Volunteer Training Completed- Ongoing with new volunteers	9/22-ongoing
Action step: Outreach to Caregivers/ Older Adults available service	Follow-up calls to HD/Congregate seniors/ caregivers to inform them of new volunteer service	10/22-ongoing
Action step: Implementation of volunteer service	Use of new program. Survey senior/caregiver who used program the improvements could be made and determine success of program.	11/22-2024 Ongoing
<b>Strategy 3: Work with local School and College to identify student involvement with home-chore service</b>		



<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
Action step: Contact school counselor and college administration to identify student need for community service/ field experience to assist with senior/caregiver home care service.	Set up meetings with Hurley K-12 School and Gogebic Community College.  Meeting Completed and Interest Determined	9/30/23
Action step: Determine list of students who need work experience/ community service	Create List of students and their abilities to help senior/caregivers	10/30/23
Action step: Create permission slip. For student/ parent to agree to community service.	Create Permission Slip receive them back from students interested in participation.	11/1/23
Action step: Implement student/program	Implement program access success with school and caregiver/older adult on annual basis	12/30/23-24 Ongoing
<b>Annual progress notes</b>		

<b>Focus area: Inclusiveness/ Equality</b>	<b>Due Date</b>
<b>Goal statement: Increase racial awareness and inclusion of all Title III programs amongst ADRC/Aging Staff</b>	12/31/2024
<b>Plan for measuring overall goal success</b> – <i>How will you know that you have achieved the results you want? Use data.</i> Provide training to ADRC and Aging Staff on Racial Equality and importance of Inclusion pertaining to all service areas of Title III and ADRC services.	

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
<b>Strategy 1: Determine ADRC/Aging staff knowledge of racial equality and inclusion topics</b>		
Action step: Survey staff on current knowledge on topic and determine need of learning	Survey Staff Completed and Data collected.	1/31/22

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
Action step: Determine needs and types of training staff want regarding topic.	Use date to determine training and materials needed.	1/31/22
<b>Strategy 2: Research trainings that focus on racial equality and inclusion</b>		
Action step: Research educational media sources TED- Talks, State of Wisconsin materials on racial equality and importance of inclusion	Research topics and determine appropriate materials for training	2/28/22
<b>Strategy 3: Hold Annual Training on Topic focus on Inclusion and Racial Equality</b>		
Action step: Set up annual training on topic	Training Completed	5/22- Annual
Action step: Hold after meeting discussion on topic	Discussion Completed	5/22- Annual
Action step: Annual staff survey to determine if more knowledge or awareness was gained on topic.	Survey completed and follow-up discussion with individual if needed after.	5/22- Annual
<b>Annual progress notes</b>		

<b>Focus area: Advocacy</b>	<b>Due Date</b>
<b>Goal statement: Increase the knowledge and skills for older adults to advocate for their healthcare needs.</b>	12/31/24
<b>Plan for measuring overall goal success</b> – <i>How will you know that you have achieved the results you want? Use data.</i>	
Data collection from healthcare surveys will determine if older adults have gained more knowledge regarding their healthcare coverage benefits.	

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
<b>Strategy 1: Survey EBS clientele, senior nutrition participants and ADRC clients to get baseline of healthcare</b>	Create Survey and Disperse Gather data from survey to determine advocacy needs.	2/28/22

<b>Specific strategies and steps to meet your goal:</b>	<b>Measure</b> ( <i>How will you know the strategies and steps have been completed?</i> )	<b>Due Date</b>
<b>knowledge and needs related to Medicare/Healthcare.</b>		
Action Step 1: Use data from survey to identify ways for seniors to advocate for their healthcare needs and gain more about their healthcare coverage.	Compile Data and identify training and ways to help older adults to be their own advocates.	3/28/22
<b>Strategy 2:</b> Elder Benefit Specialist will put together outreach activities based on survey results to determine presentation, training, education desired.	Gathered information and criteria will be determine and organized into presentation.	5/1/22
Action Step 1: Used Date Collection to determine methods.		5/1/22
Action Step 2: Promote event for older adults for example: Use Medicare 101 presentations, know your rights training, etc. to be presented at senior centers, elderly housing complexes, library etc.	Promote and Advertise Event time/ location/ date to community partners, social medical, senior nutrition, EBS clients etc.	6/22-8/22
Action Step 3: Hold Events in Community	Events Held- Completion	6/22-8/22
Action Step 4: Pre/Post survey from events to determine success of gained knowledge	Assess Surveys and Success the training/education programs	6/22-8/22
<b>Strategy 3:</b> Team up with local health care clinic- Aspirus Hurley to offer education on Power of Attorney- Health care directives	Set up Meeting with Aspirus Hurley Clinic	10/1/22
Action Step 1: Coordinate with Aspirus to team up with their social services and offer information, how to fill out POA paperwork, importance etc.	Coordinate and determine dates of events	11/1/22
Action Step 2: Marketing and Promotion of Events to Community	Marketing on Facebook site, flyers distribution to meal sites, community partners etc. completed	12/30/22
Action Step 3: Program Event Held	Completion of Event	1/31/2023
Action Step 4: Monthly follow up with Aspirus social services to determine patients who need help advocating to complete these forms with ADRC staff assistance.	Set Follow up Monthly Calls to determine patient needs-related to healthcare coverage, advocating, POA assistance.	Monthly-Annual Follow up 2022-2024

## Coordination Between Title III and Title VI

Iron County does not fall within a tribal service area however we understand tribal members may travel through our county or come to reside in Iron County at any given time. The ADRC OF THE NORTH-Iron County branch/ Aging Services will outreach to our nearest tribal community at Bad River Odanah Wisconsin via basic information and resources that are available in Iron County on a quarterly basis.

## Organization, Structure and Leadership of the Aging Unit

Aging Services and the Aging & Disability Resource Center of Iron County have been an integrated unit since 2015. The complete integration of ADRC and Aging staff relocated into one building occurred in 2020. Our mission statement reflects the premise by which we operate. The mission of the Aging and Disability Resource Center of the North-Iron County Branch is to provide a one stop source of information and assistance for older adults, adults with disabilities, their families, friends and caregivers to link them to all available resources both statewide and locally with the goal to enable the target group to live independently in the community.

### **ADRC OF THE NORTH-IRON COUNTY BRANCH OFFICE HOURS OF OPERATION**

**8:00AM TO 4:00PM, Monday through Friday**

**LOCAL ADRC PHONE NUMBER: 715-561-2108**

**ADRC Phone Number 1-866-663-3607**

**Primary Contact to Respond to Questions About the Aging Plan Template**

Name: Trista Olson

Title: Aging/ADRC Manager

County: Iron

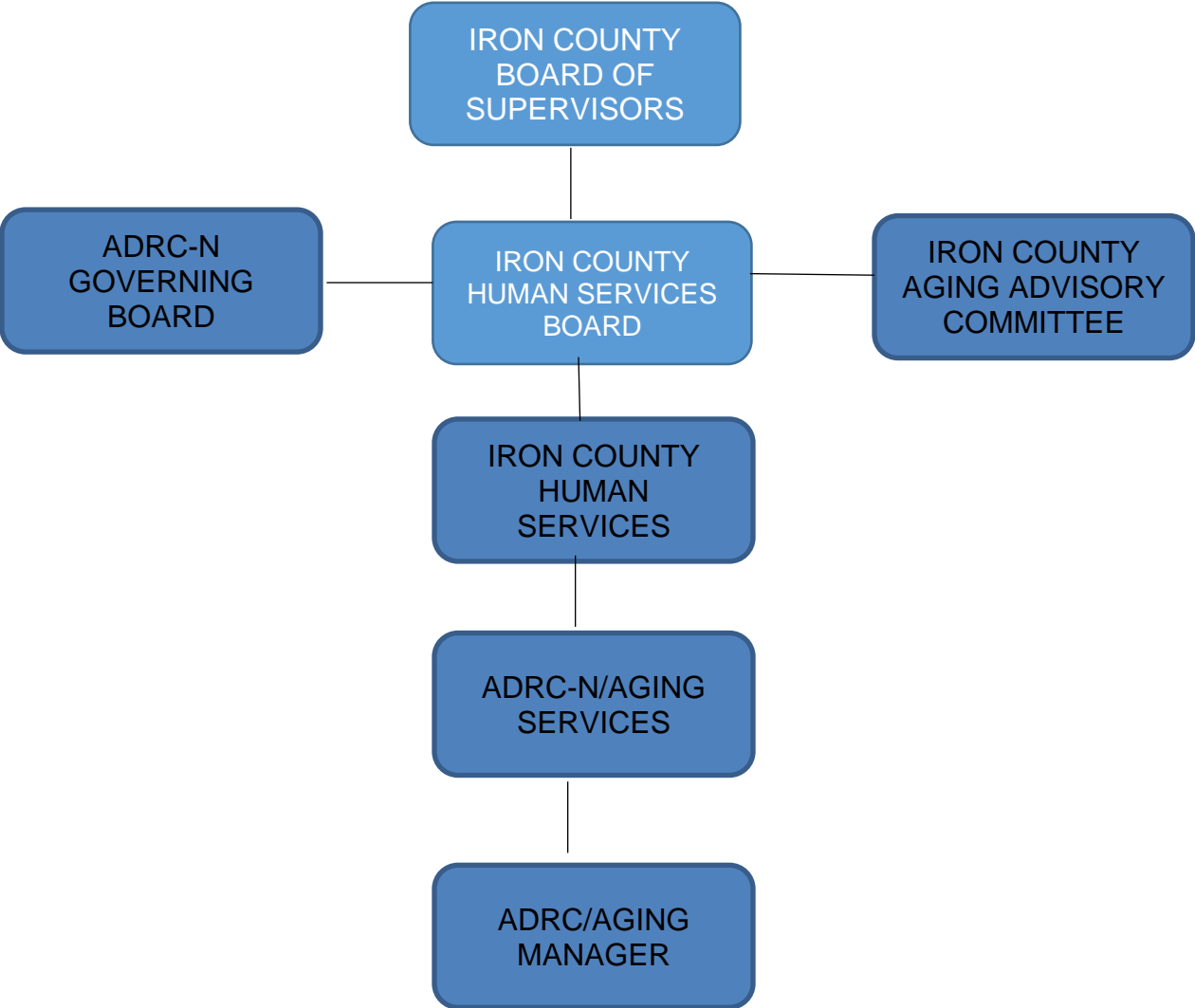
Organizational Name: Aging & Disability Resource Center of the North- Iron County Branch

Address: 307 3<sup>rd</sup> Ave South Hurley, WI 54534

City: Hurley State: WI Zip Code: 54534

Email Address: [olsont@ironcountywi.org](mailto:olsont@ironcountywi.org) \_ Phone # 715-561-2108 ext.

# Organizational Chart of the Aging Unit



**Title III-programs are managed by the ADRC/AGING Manager who oversees all aging programs under Iron County Human Services Department. The ADRC/Aging manager Trista Olson works with the Aging Advisory Committee and the Human Service Board (policy-making body) to ensure all program requirements are met and budget approved. Service Delivery is provided by the following positions and overseen by the ADRC/Aging Manager:**

Senior Nutrition Program: Head Cook Dianne Alexandroni, Anna Mooi registered dietician and Trista Olson ADRC/Aging Manager.

Aging Transportation: Drivers Greg Rigoni, Jim Mildren, Michele Siebel-bookkeeping and transportation reporting and Trista Olson ADRC/Aging Manager

Caregiver Programs: NFCSP & AFCSP  
 NFCSP services are provided by ADRC staff Mindy Smee & Chanel Youngs with budget monitoring by Michele Seibel and program coordinator Trista Olson  
 AFCSP- Budget it held at ADRC level

Title III-D Health Promotion:  
 Services are provided by ADRC staff Mindy Smee & Chanel Youngs along with program overseen by Trista Olson

EBS: ADRC position held by Lannie Thomas EBS Specialist

**Staff of the Aging Unit**

List the people employed by the aging unit. Include additional rows as needed.

Name: <b>Trista Olson (COUNTY POSITION)</b> Job Title: ADRC/Aging Manager Telephone Number (715)-561-2108/email Address: <a href="mailto:olsont@ironcountywi.org">olsont@ironcountywi.org</a>
Brief Description of Duties: Administers and oversees the Older American Act programs and Aging and Disability Resource Center activities; provides direct supervision to Aging and Disability Resource Center staff; supervises Elder Nutrition program operations including congregate and home delivered meals; provides input and assistance with preparation of annual budgets.
Name: <b>Michele Seibel</b> Job Title- Book Keeper Telephone Number (715) 561-2108 /email Address: <a href="mailto:mseibel@agingunit.net">mseibel@agingunit.net</a>

<p>Brief Description of Duties: Assist in receptionist duties as needed. Activities included but not limited to the following: record required data in the S.A.M.S program; prepare, file, create and pay out for payroll; collect and review invoices for payment; balance bank statements; prepare board reports and packets; prepare billing for jail meals; general ledger report monthly for audit purposes; manage and order office supplies; prepare monthly GWARR certificate of claim: submit for payment; assist in the preparation of deposit and create forms and keep file current.</p>
<p>Name: <b>Pamela Neimi</b>  Job Title: Office Assistant and Transportation Coordinator  Telephone Number (715) 561-2108 /email Address: <a href="mailto:neimip@ironcountywi.org">neimip@ironcountywi.org</a></p>
<p>Brief Description of Duties: Perform receptionist duties such as: answering telephones, taking meal and transportation reservations, taking messages, filing and photocopying; manage and prepare reservation sheets for home delivery and congregate meal sites; record all home delivery and meal site reservations in computer; coordinate the rental of the Hurley meal site building and keep record of rental information and deposits; assist in the preparation of bank deposit slips; record required dates into the S.A.M.S. program; print menus and collect, record driver information including home delivery, medical, shopping and recreational outings.</p>
<p>Name: <b>Lannie Thomas (ADRC COUNTY STAFF)</b>  Job Title: Elder Benefit Specialist  Telephone Number /email Address: (715)561-2108/ <a href="mailto:thomasl@ironcountywi.org">thomasl@ironcountywi.org</a></p>
<p>Brief Description of Duties: Assist persons 60 and over to apply for county, state and or federal benefits such as Social Security Disability, SSI, SSDI, Veterans Benefits, Medicare, medical assistance, Medicare savings programs, low-income housing benefits, Homestead tax credits, energy assistance and weatherization. EBS will inform elderly in matters of consumer protection and make referral to attorney if case exceeds benefit specialist qualifications or to appropriate agency; maintain confidentiality of clients; perform outreach events throughout county; attend training sessions and complete required reports; perform other duties assigned by the ADRC/Aging Manager.</p>
<p>Name: <b>Mindy Sme (ADRC COUNTY STAFF)</b>  Job Title: I and A Specialist  Telephone Number/email Address/email Address: 715-561-2108/  smeem@ironcountywi.org</p>
<p>Brief Description of Duties: Social Worker to provide information and assistance regarding services and resources available; provide long-term options counseling; performing long-term care functional screens; community outreach presentations and workshops; provide some back up intake for Adult Protective and Adult at Risk Services; record client contact and services into computer-based program Nightingale Notes; report any service gaps or conflicts to the ADRC/Aging Manager.</p>
<p>Name: <b>Chanel Youngs (ADRC COUNTY STAFF)</b>  Job Title: I &amp; A Specialist/ Adult Protective Services Social Worker  Telephone Number/email Address: (715)561-3636 ext. 2136/<a href="mailto:youngsc@ironcountywi.org">youngsc@ironcountywi.org</a></p>
<p>Brief Description of Duties: Social Worker to provide information and assistance regarding services and resources available; provide long-term care options counseling; performing long-term care functional screens; community outreach presentations and</p>

workshops; complete adult protective service intake; investigations and service coordination for adult at risk populations; record client contact and services into computer based program Nightingale Notes; report any service gaps or conflicts to the ADRC/Aging Manager.
<p>Name <b>Dianne Alexandroni</b>  Job Title: Head Cook  Telephone Number/email Address (715)561-2108/ NO EMAIL</p>
<p>Brief Description of Duties : The head cook is responsible for the ordering, preparing and serving of meals for the Older American Nutrition Program and building and site safety matters and issues; day to day kitchen operations; meal portions of nutrition; prepare and serve meals for the congregate, home delivery and jail; order food for all meal sites; seek the best cost benefit of all products ordered for the agency; keep a running paper inventory of all products received; record food, refrigerator and freezer temperatures; attend all training as required for the nutrition program; communicate with the site managers regarding menu planning; supervise Hurley Home Delivery Driver, Hurley assistant cooks and Hurley kitchen volunteers. Report any issues to the ADRC/ Aging Manager.</p>
<p>Name: <b>Tawnya Kangas</b>  Job Title: Site Manager/Cook (Mercer meal site)  Telephone Number/email Address: 715-476-2113</p>
<p>Brief Description of Duties: The site manager is responsible for the day-to-day operations, quality control, record keeping, food transportation, monies, and personnel at assigned site. Prepare and serve meals for the congregate and home delivered meals; ensure all products are stored properly in compliance with all regulations of the dining center; record food, refrigerator, and freezer temperatures; handle donation box and ensure that donations are keep confidential. Turn in the reservation's sheets and donations to the main office; supervise volunteers and home delivery drivers; attend all training as required of the nutrition program; communicate with the head cook regarding menu planning; perform other duties assigned by the ADRC/ Aging Manager &amp; conduct annual fire drills to ensure participate safety and to assist those who might be too frail to exit on their own.</p>
<p>Name: <b>Vacancy</b>  Job Title: Site Manager/Cook (Iron Belt &amp; Saxon meal site)  Telephone Number/email Address</p>
<p>Brief Description of Duties: The site manager is responsible for the day-to-day operations, quality control, record keeping, food transportation, monies and personnel at assigned site. Prepare and serve meals for the congregate and home delivered meals; ensure all products are stored properly in compliance with all regulations of the dining center; record food, refrigerator and freezer temperatures; handle donation box and ensure that donations are keep confidential. Turn in the reservation's sheets and donations to the main office; supervise volunteers and home delivery drivers; attend all training as required of the nutrition program; communicate with the head cook regarding menu planning; perform other duties assigned by the ADRC/ Aging Manager &amp; conduct annual fire drills to ensure participate safety and to assist those whom might be too frail to exit on their own.</p>
<p>Name: <b>Terri Siebel</b></p>



<p>Job Title- Nutrition Delivery Driver (Hurley Area) Telephone number (715) 561-2108 /email Address- NO EMAIL</p>
<p>Brief Description of Duties: Assist in the kitchen as needed, including stocking food deliveries; verify the number of Home Delivered Meals with the office assistant at the beginning and at the end of the day; assist in packing coolers and counting items to ensure they have correct number items needed to be delivered; ensure that food is kept at proper temperature until delivered; complete “test tray” forms and take temperature of test meal at the end of the route at least once a week; deliver meals to homebound in a timely manner under conditions specified by the Nutrition Program; Be willing to rotate weekends and holidays to prepare and deliver Iron County jail meals and perform other duties assigned by the ADRC/Aging manager as time allows.</p>
<p>Name <b>Laurel Gabel</b> Job Title: Meals on Wheels Delivery (Mercer) Telephone number/email Address 715-476-2113</p>
<p>Brief Description of Duties: Assist in the kitchen as needed, including stocking food deliveries; verify the number of Home Delivered Meals with the office assistant at the beginning and at the end of the day; assist in packing coolers and counting items to ensure they have correct number items needed to be delivered; ensure that food is kept at proper temperature until delivered; complete “test tray” forms and take temperature of test meal at the end of the route at least once a week; deliver meals to homebound in a timely manner under conditions specified by the Nutrition Program and perform other duties assigned by the ADRC/Aging manager as time allows.</p>
<p>Name <b>Greg Rigoni</b> Job Title Transportation Driver Telephone number (715) 561-2108 /email Address: NO EMAIL</p>
<p>Brief description of duties: Transport passengers to and from areas on a regular schedule for the purpose of medical, shopping, meal sites or entertainment in a safe and courteous manner; collect money for the transportation services in the manner approved by Iron County; must keep the vehicle up to DOT standards and report any necessary repairs of equipment to the ADRC/Aging Manager; keep the vehicles clean, safe and operational at all times; make sure the vehicle is assessable annually for inspection by DOT inspector or as required; collect and record passenger information and donation as prescribed by Iron County; attend training sessions as assigned and perform other duties assigned by the ADRC/Aging Manager.</p>
<p>Name <b>Jim Mildren</b> Job title: Back up Transportation Driver Telephone number/email Address: 715-561-2108 /NO EMAIL</p>
<p>Brief Description of Duties: Transport passengers to and from areas on a regular schedule for the purpose of medical, shopping, meal sites or entertainment in a safe and courteous manner; collect money for the transportation services in the manner approved by Iron County; must keep the vehicle up to DOT standards and report any necessary repairs of equipment to the ADRC/Aging Manager; keep the vehicles clean, safe and operational at all times; make sure the vehicle is assessable annually for inspection by DOT inspector or as required; collect and record passenger information</p>

and donation as prescribed by Iron County; attend training sessions as assigned and perform other duties assigned by the ADRC/Aging Manager.
<b>Name Karen Henning</b> Job Title: Assistant Cook #1 Telephone number/email Address (715)561-2108/ NO EMAIL
Brief Description of Duties: To assist the cook in preparing meals; assists in the cleaning of the kitchen and dining room; attend training sessions as required of the nutrition program.
<b>Name: Vacancy</b> Job Title: Back-Up Assistant Cook Telephone number/email Address (715)561-2108/ NO EMAIL
Brief Description of Duties: To assist the cook in preparing meals; prepare and deliver meals to the jail; assists in the cleaning of the kitchen and dining room; fill in as home deliver meal driver as needed; fill in as site cook at all locations and attend training sessions as required of the nutrition program.
<b>Name Jim Amerson</b> Job Title: Assistant Cook- Mercer Site Telephone number/email Address (715)476-2113/ NO EMAIL
Brief Description of Duties: To assist the cook in preparing meals; assists in the cleaning of the kitchen and dining room; attend training sessions as required of the nutrition program.

### Aging Unit Coordination with ADRCs

By resolution of the Iron County Board of Supervisors, the Aging Unit of Iron County integrated into the ADRC of the North in December of 2015. The integration allows for effective communication and collaboration between staff in various positions, maximizing the usage of the various small grants and effective service delivery in a timely manner for those needing assistance. The ADRC-N Branch office and Aging staff moved to a new building in early 2020 so that both staff could be located in the same building. The ADRC OF THE NORTH-Iron County branch is conveniently located across from the Hurley Senior Center which allows for easy access for seniors going to either building for services. Aging and ADRC staff provided input into the development of the goals in this plan so that there would be collaboration in achieving the stated goals.

### Statutory Requirements for the Structure of the Aging Unit

[Chapter 46.82 of the Wisconsin Statutes](#) sets certain legal requirements for aging units. Consider if the county or tribe is in compliance with the law. If the aging unit is part of an ADRC the requirements of [46.82](#) still apply.

<b>Organization:</b> The law permits one of three options. Which of the following permissible options has the county chosen?	<b>Check One</b>
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(1) An agency of county/tribal government with the primary purpose of administering programs for older individuals of the county/tribe.	
(2) A unit, within a county/tribal department with the primary purpose of administering programs for older individuals of the county/tribe.	X
(3) A private, nonprofit corporation, as defined in s. 181.0103 (17).	
<b>Organization of the Commission on Aging:</b> The law permits one of three options. Which of the following permissible options has the county chosen?	<b>Check One</b>
For an aging unit that is described in (1) or (2) above, organized as a committee of the county board of supervisors/tribal council, composed of supervisors and, advised by an advisory committee, appointed by the county board/tribal council. Older individuals shall constitute at least 50% of the membership of the advisory committee and individuals who are elected to any office may not constitute 50% or more of the membership of the advisory committee.	X
For an aging unit that is described in (1) or (2) above, composed of individuals of recognized ability and demonstrated interest in services for older individuals. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.	
For an aging unit that is described in (3) above, the board of directors of the private, nonprofit corporation. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.	
<b>Full-Time Aging Director:</b> The law requires that the aging unit have a full-time director as described below. Does the county have a full-time aging director as required by law?	<b>Circle One</b> Yes No

## Role of the Policy-Making Body

The policy-making body, also called the commission on aging, must approve the aging unit plan. Evidence of review and approval of the draft and final version of the aging unit plan must be included as part of the plan. Attach the evidence of this required involvement as an appendix to the aging plan.

## Membership of the Policy-Making Body

The commission is the policy making entity for aging services (46.82 (4) (a) (1)) and an aging advisory committee is not the commission. List the membership of the aging unit's policy-making body using the template provided below and include in the body of the aging plan. There are term limits for the membership of the policy-making body.

## Membership of the Policy-Making Body Template

**Official Name of the County Aging Unit’s Policy-Making Body:**

<b>Official Name of the County Aging Unit’s Policy-Making Body (list below)</b>			
<b>IRON COUNTY HUMAN SERVICES BOARD</b>			
<b>Name</b>	<b>Age 60 and Older</b>	<b>Elected Official</b>	<b>Year First Term Began</b>
<b>Chairperson:</b> Opal Roberts	Y	x	2010
Tom Innes	Y		2012
Carol Mattson	Y		2002
Vic Ouimette	Y		2014
Jamey Frances	N	x	2018
John Sendra	Y	x	2016
Kathy Byrns	Y	x	2020
Larry Youngs	N	x	2016

**Role of the Advisory Committee**

Where an aging unit has both an advisory committee (sometimes referred to as the advisory council) and a policy-making body, a key role of the advisory committee is to advise the policy-making body in the development of the plan and to advocate for older adults. Evidence of this involvement should be listed as an attachment in the appendices of the aging unit plan.

**Membership of the Advisory Committee**

An aging advisory committee is required if the commission (policy-making body) does not follow the Elders Act requirements for elected officials, older adults, and terms, or if the commission is a committee of the county board (46.82 (4) (b) (1)). If the aging unit has an advisory committee, list the membership of the advisory committee using the template provided below and include in the body of the aging plan. Older individuals shall constitute at least 50% of the membership of the advisory committee and individuals who are elected to any office may not constitute 50% or more of the membership of the advisory committee. There are no term limit requirements on advisory committees.

## Membership of the Advisory Committee Template

Official Name of the County Aging Unit's Advisory Committee:

Official Name of the County Aging Unit's Advisory Committee (list below)			
Iron County Aging Advisory Committee			
Name	Age 60 and Older	Elected Official	Year First Term Began
<b>Chairperson:</b> Betty Meinholz	X		2017
Jamey Francis		x	2018
Kalvin Patzer	X		
Tom Innes	X		2017
Mary Mattson	X		2017
Opal Roberts	X	x	2018
Candy Pogliano	X		2017

## Budget Summary

The aging unit is required to submit an annual budget to the AAA using a budget worksheet approved by BADR. Final budgets are to be submitted with the aging plan on November 5<sup>th</sup>, 2021. Due dates for annual aging unit budgets for CY 2023 and 2024 will be determined in cooperation with the AAAs and BADR and communicated with aging units when the dates are set.

Budget summary information should be inserted into the document. It is also acceptable to provide a hyperlink to budget summary information. Aging units may choose to use pie charts or graphs to highlight how funds are spent for services and supports for older adults and caregivers.

In addition, the budget summary page must be clearly posted on a public webpage for review following final approval by the aging unit governing body.

## Verification of Intent

The purpose of the Verification of Intent is to show that county government has approved the plan. It further signifies the commitment of county government to carry out the plan. Copies of approval documents must be available in the offices of the aging unit.

Use the template provided below and include in the body of the aging plan.

### Verification of Intent Template

The person(s) authorized to sign the final plan on behalf of the commission on aging and the county board must sign and indicate their title. This approval must occur before the final plan is submitted to the AAA for approval.

In the case of multi-county aging units, the verification page must be signed by the representatives, board chairpersons, and commission on aging chairpersons, of all participating counties.

We verify that all information contained in this plan is correct.

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Signature and Title of the Chairperson of the Commission on Aging      Date

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Signature and Title of the Authorized County Board Representative      Date

## **Assurances of Compliance with Federal and State Laws and Regulations**

A signed copy of this statement must accompany the plan. The plan must be signed by the person with the designated authority to enter into a legally binding contract. Most often this is the county board chairperson. The assurances agreed to by this signature page must accompany the plan when submitted to the AAA and BADR.

The assurances need not be included with copies of the plan distributed to the public.

Use the template provided below and include in the body of the aging plan.

### **Compliance with Federal and State Laws and Regulations for 2022-2024**

On behalf of the county, we certify

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(Give the full name of the county aging unit)

has reviewed the appendix to the county plan entitled Assurances of Compliance with Federal and State Laws and Regulations for 2022-2024. We assure that the activities identified in this plan will be carried out to the best of the ability of the county in compliance with the federal and state laws and regulations listed in the Assurances of Compliance with Federal and State Laws and Regulations for 2022-2024.

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Signature and Title of the Chairperson of the Commission on Aging	Date
---	------

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Signature and Title of the Authorized County Board Representative	Date
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**The applicant certifies compliance with the following regulations:**

1. Legal Authority of the Applicant

- The applicant must possess legal authority to apply for the grant.
- A resolution, motion or similar action must be duly adopted or passed as an official act of the applicant's governing body, authorizing the filing of the application, including all understandings and assurances contained therein.
- This resolution, motion or similar action must direct and authorize the person identified as the official representative of the applicant to act in connection with the application and to provide such additional information as may be required.

2. Outreach, Training, Coordination & Public Information

- The applicant must assure that outreach activities are conducted to ensure the participation of eligible older persons in all funded services as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.
- The applicant must assure that each service provider trains and uses elderly persons and other volunteers and paid personnel as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.
- The applicant must assure that each service provider coordinates with other service providers, including senior centers and the nutrition program, in the planning and service area as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.
- The applicant must assure that public information activities are conducted to ensure the participation of eligible older persons in all funded services as required by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging.

3. Preference for Older People with Greatest Social and Economic Need

The applicant must assure that all service providers follow priorities set by the Bureau of Aging and Disability Resources Resource's designated Area Agency on Aging for serving older people with greatest social and economic need.

4. Advisory Role to Service Providers of Older Persons

The applicant must assure that each service provider utilizes procedures for obtaining the views of participants about the services they receive.

5. Contributions for Services

- The applicant shall assure that agencies providing services supported with Older Americans Act and state aging funds shall give older adults a free and voluntary



opportunity to contribute to the costs of services consistent with the Older Americans Act regulations.

- Each older recipient shall determine what he/she is able to contribute toward the cost of the service. No older adult shall be denied a service because he/she will not or cannot contribute to the cost of such service.
- The applicant shall provide that the methods of receiving contributions from individuals by the agencies providing services under the county/tribal plan shall be handled in a manner that assures the confidentiality of the individual's contributions.
- The applicant must assure that each service provider establishes appropriate procedures to safeguard and account for all contributions.
- The applicant must assure that each service provider considers and reports the contributions made by older people as program income. All program income must be used to expand the size or scope of the funded program that generated the income. Nutrition service providers must use all contributions to expand the nutrition services. Program income must be spent within the contract period that it is generated.

## 6. Confidentiality

- The applicant shall ensure that no information about, or obtained from an individual and in possession of an agency providing services to such individual under the county/tribal or area plan, shall be disclosed in a form identifiable with the individual, unless the individual provides his/her written informed consent to such disclosure.
- Lists of older adults compiled in establishing and maintaining information and referral sources shall be used solely for the purpose of providing social services and only with the informed consent of each person on the list.
- In order that the privacy of each participant in aging programs is in no way abridged, the confidentiality of all participant data gathered and maintained by the State Agency, the Area Agency, the county or tribal aging agency, and any other agency, organization, or individual providing services under the State, area, county, or tribal plan, shall be safeguarded by specific policies.
- Each participant from whom personal information is obtained shall be made aware of his or her rights to:
  - (a) Have full access to any information about one's self which is being kept on file;
  - (b) Be informed about the uses made of the information about him or her, including the identity of all persons and agencies involved and any known consequences for providing such data; and,
  - (c) Be able to contest the accuracy, completeness, pertinence, and necessity of information being retained about one's self and be assured that such information, when incorrect, will be corrected or amended on request.
- All information gathered and maintained on participants under the area, county or tribal plan shall be accurate, complete, and timely and shall be legitimately

necessary for determining an individual's need and/or eligibility for services and other benefits.

- No information about, or obtained from, an individual participant shall be disclosed in any form identifiable with the individual to any person outside the agency or program involved without the informed consent of the participant or his/her legal representative, except:
  - (a) By court order; or,
  - (b) When securing client-requested services, benefits, or rights.
- The lists of older persons receiving services under any programs funded through the State Agency shall be used solely for the purpose of providing said services, and can only be released with the informed consent of each individual on the list.
- All paid and volunteer staff members providing services or conducting other activities under the area plan shall be informed of and agree to:
  - (a) Their responsibility to maintain the confidentiality of any client-related information learned through the execution of their duties. Such information shall not be discussed except in a professional setting as required for the delivery of service or the conduct of other essential activities under the area plan; and,
  - (b) All policies and procedures adopted by the State and Area Agency to safeguard confidentiality of participant information, including those delineated in these rules.
- Appropriate precautions shall be taken to protect the safety of all files, microfiche, computer tapes and records in any location which contain sensitive information on individuals receiving services under the State or area plan. This includes but is not limited to assuring registration forms containing personal information are stored in a secure, locked drawer when not in use.

## 7. Records and Reports

- The applicant shall keep records and make reports in such form and requiring such information as may be required by the Bureau of Aging and Disability Resources and in accordance with guidelines issued solely by the Bureau of Aging and Disability Resources and the Administration on Aging.
- The applicant shall maintain accounts and documents which will enable an accurate review to be made at any time of the status of all funds which it has been granted by the Bureau of Aging and Disability Resources through its designated Area Agency on Aging. This includes both the disposition of all monies received and the nature of all charges claimed against such funds.

## 8. Licensure and Standards Requirements

- The applicant shall assure that where state or local public jurisdiction requires licensure for the provision of services, agencies providing services under the county/tribal or area plan shall be licensed or shall meet the requirements for licensure.

- The applicant is cognizant of and must agree to operate the program fully in conformance with all applicable state and local standards, including the fire, health, safety and sanitation standards, prescribed in law or regulation.

## 9. Civil Rights

- The applicant shall comply with Title VI of the Civil Rights Act of 1964 (P.L. 88-352) and in accordance with that act, no person shall on the basis of race, color, or national origin, be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination under any program or activity under this plan.
- All grants, sub-grants, contracts or other agents receiving funds under this plan are subject to compliance with the regulation stated in 9 above.
- The applicant shall develop and continue to maintain written procedures which specify how the agency will conduct the activities under its plan to assure compliance with Title VI of the Civil Rights Act.
- The applicant shall comply with Title VI of the Civil Rights Act (42 USC 2000d) prohibiting employment discrimination where (1) the primary purpose of a grant is to provide employment or (2) discriminatory employment practices will result in unequal treatment of persons who are or should be benefiting from the service funded by the grant.
- All recipients of funds through the county/tribal or area plan shall operate each program or activity so that, when viewed in its entirety, the program or activity is accessible to and usable by handicapped adults as required in the Architectural Barriers Act of 1968.

## 10. Uniform Relocation Assistance and Real Property Acquisition Act of 1970

The applicant shall comply with requirements of the provisions of the Uniform Relocation and Real Property Acquisitions Act of 1970 (P.L. 91-646) which provides for fair and equitable treatment of federal and federally assisted programs.

## 11. Political Activity of Employees

The applicant shall comply with the provisions of the Hatch Act (5 U.S.C. Sections 7321-7326), which limit the political activity of employees who work in federally funded programs. [Information about the Hatch Act is available from the U.S. Office of Special Counsel at <http://www.osc.gov/>]

## 12. Fair Labor Standards Act

The applicant shall comply with the minimum wage and maximum hours provisions of the Federal Fair Labor Standards Act (Title 29, United States Code, Section 201-219), as they apply to hospital and educational institution employees of state and local governments.

### 13. Private Gain

The applicant shall establish safeguards to prohibit employees from using their positions for a purpose that is or appears to be motivated by a desire for private gain for themselves or others (particularly those with whom they have family, business or other ties).

### 14. Assessment and Examination of Records

- The applicant shall give the Federal agencies, State agencies and the Bureau of Aging and Disability Resources Resource's authorized Area Agencies on Aging access to and the right to examine all records, books, papers or documents related to the grant.
- The applicant must agree to cooperate and assist in any efforts undertaken by the grantor agency, or the Administration on aging, to evaluate the effectiveness, feasibility, and costs of the project.
- The applicant must agree to conduct regular on-site assessments of each service provider receiving funds through a contract with the applicant under the county or tribal plan.

### 15. Maintenance of Non-Federal Funding

- The applicant assures that the aging unit, and each service provider, shall not use Older Americans Act or state aging funds to supplant other federal, state or local funds.
- The applicant must assure that each service provider must continue or initiate efforts to obtain funds from private sources and other public organizations for each service funded under the county or tribal plan.

### 16. Regulations of Grantor Agency

The applicant shall comply with all requirements imposed by the Department of Health and Family Services, Division of Supportive Living, Bureau of Aging and Disability Resources concerning special requirements of federal and state law, program and fiscal requirements, and other administrative requirements.

### 17. Older Americans Act

Aging Units, through binding agreement/contract with an Area Agency on Aging must support and comply with following requirements under the Older Americans Act (Public Law 89-73) [As Amended Through P.L. 116-131, Enacted March 25, 2020] Reference: 45 CFR Part 1321 – Grants to State and Community Programs on Aging.

Sec. 306. (a)

(1) provide, through a comprehensive and coordinated system, for supportive services, nutrition services, and, where appropriate, for the establishment, maintenance, modernization, or construction of multipurpose senior centers (including a plan to use the skills and services of older individuals in paid and unpaid work, including multigenerational and older individual to older individual work), within the planning and service area covered by the plan, including determining the extent of need for supportive services, nutrition services, and multipurpose senior centers in such area (taking into consideration, among other things, the number of older individuals with low incomes residing in such area, the number of older individuals who have greatest economic need (with particular attention to low income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) residing in such area, the number of older individuals who have greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) residing in such area, the number of older individuals at risk for institutional placement residing in such area, and the number of older individuals who are Indians residing in such area, and the efforts of voluntary organizations in the community), evaluating the effectiveness of the use of resources in meeting such need, and entering into agreements with providers of supportive services, nutrition services, or multipurpose senior centers in such area, for the provision of such services or centers to meet such need;

(2) provide assurances that an adequate proportion, as required under section 307(a)(2), of the amount allotted for part B to the planning and service area will be expended for the delivery of each of the following categories of services-

(A) services associated with access to services (transportation, health services (including mental health services), outreach, information and assistance (which may include information and assistance to consumers on availability of services under part B and how to receive benefits under and participate in publicly supported programs for which the consumer may be eligible), and case management services);

(B) in-home services, including supportive services for families of older individuals who are victims of Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and

(C) legal assistance;

and assurances that the Area Agency on Aging will report annually to the State agency in detail the amount of funds expended for each such category during the fiscal year most recently concluded.

(3)(A) designate, where feasible, a focal point for comprehensive service delivery in each community, giving special consideration to designating multipurpose senior centers (including multipurpose senior centers operated by organizations referred to in paragraph (6)(C)) as such focal point; and (B) specify, in grants, contracts, and agreements implementing the plan, the identity of each focal point so designated;

(4)(A)(i)(I) provide assurances that the Area Agency on Aging will—

- (aa) set specific objectives, consistent with State policy, for providing services to older individuals with greatest economic need, older individuals with greatest social need, and older individuals at risk for institutional placement;
- (bb) include specific objectives for providing services to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas; and

(II) include proposed methods to achieve the objectives described in items (aa) and (bb) of subclause (I);

(ii) provide assurances that the Area Agency on Aging will include in each agreement made with a provider of any service under this title, a requirement that such provider will—

- (I) specify how the provider intends to satisfy the service needs of low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in the area served by the provider;
- (II) to the maximum extent feasible, provide services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; and
- (III) meet specific objectives established by the Area Agency on Aging, for providing services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area; and

(4)(A)(iii) With respect to the fiscal year preceding the fiscal year for which such plan is prepared, each Area Agency on Aging shall--

- (I) identify the number of low-income minority older individuals and older individuals residing in rural areas in the planning and service area;
- (II) describe the methods used to satisfy the service needs of such minority older individuals; and
- (III) provide information on the extent to which the Area Agency on Aging met the objectives described in clause (a)(4)(A)(i).

(4)(B)(i) Each Area Agency on Aging shall provide assurances that the Area Agency on Aging will use outreach efforts that will identify individuals eligible for assistance under this Act, with special emphasis on--

- (I) older individuals residing in rural areas;
- (II) older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);
- (III) older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas);
- (IV) older individuals with severe disabilities;
- (V) older individuals with limited English proficiency;
- (VI) older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals);

and

(VII) older individuals at risk for institutional placement, specifically including survivors of the Holocaust; and

(4)(C) Each area agency on aging shall provide assurance that the Area Agency on Aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas.

(5) Each Area Agency on Aging shall provide assurances that the Area Agency on Aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement, with agencies that develop or provide services for individuals with disabilities.

(6)(F) Each area agency will:

in coordination with the State agency and with the State agency responsible for mental health services, increase public awareness of mental health disorders, remove barriers to diagnosis and treatment, and coordinate mental health services (including mental health screenings) provided with funds expended by the Area Agency on Aging with mental health services provided by community health centers and by other public agencies and nonprofit private organizations;

(6)(G) if there is a significant population of older individuals who are Indians in the planning and service area of the area agency on aging, the area agency on aging shall conduct outreach activities to identify such individuals in such area and shall inform such individuals of the availability of assistance under this Act;

(6)(H) in coordination with the State agency and with the State agency responsible for elder abuse prevention services, increase public awareness of elder abuse, neglect, and exploitation, and remove barriers to education, prevention, investigation, and treatment of elder abuse, neglect, and exploitation, as appropriate; and

(9)(A) the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 307(a)(9), will expend not less than the total amount of funds appropriated under this Act and expended by the agency in fiscal year 2019 in carrying out such a program under this title; and (Ombudsman programs and services are provided by the Board on Aging and Long Term Care)

(10) provide a grievance procedure for older individuals who are dissatisfied with or denied services under this title;

(11) provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as "older Native Americans"), including-

(A) information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, an assurance that the Area Agency on Aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under this title; (B) an assurance that the Area Agency on Aging will, to the maximum extent practicable, coordinate the services the agency provides under this title with services provided under title VI; and (C) an assurance that the Area Agency on Aging will make services under the area plan available, to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans.

(13) provide assurances that the Area Agency on Aging will

(A) maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships.

(B) disclose to the Assistant Secretary and the State agency-

(i) the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals; and

(ii) the nature of such contract or such relationship.

(C) demonstrate that a loss or diminution in the quantity or quality of the services provided, or to be provided, under this title by such agency has not resulted and will not result from such non-governmental contracts or such commercial relationships.

(D) demonstrate that the quantity or quality of the services to be provided under this title by such agency will be enhanced as a result of such non-governmental contracts or commercial relationships.

(E) on the request of the Assistant Secretary or the State, for the purpose of monitoring compliance with this Act (including conducting an audit), disclose all sources and expenditures of funds such agency receives or expends to provide services to older individuals.

(14) provide assurances that funds received under this title will not be used to pay any part of a cost (including an administrative cost) incurred by the Area Agency on Aging to carry out a contract or commercial relationship that is not carried out to implement this title.

(15) provide assurances that funds received under this title will be used-

(A) to provide benefits and services to older individuals, giving priority to older individuals identified in paragraph (4)(A)(i); and



(B) in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;

(16) provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care;

(17) include information detailing how the area agency on aging will coordinate activities, and develop long-range emergency preparedness plans, with local and State emergency response agencies, relief organizations, local and State governments, and any other institutions that have responsibility for disaster relief service delivery;

### **Wisconsin Elders Act**

If the applicant is an aging unit, the aging unit must comply with the provisions of the Wisconsin Elders Act.

Wisconsin Statutes Chapter 46.82 Aging unit.

“Aging unit” means an aging unit director and necessary personnel, directed by a county or tribal commission on aging and organized as one of the following:

- (1) An agency of county or tribal government with the primary purpose of administering programs of services for older individuals of the county or tribe.
- (2) A unit, within a county department under s. 46.215, 46.22
- (3) or 46.23, with the primary purpose of administering programs of
- (4) services for older individuals of the county.
- (5) A private corporation that is organized under ch. 181 and
- (6) that is a nonprofit corporation, as defined in s. 181.0103 (17).

**Aging Unit; Creation.** A county board of supervisors of a county, the county boards of supervisors of 2 or more contiguous counties or an elected tribal governing body of a federally recognized American Indian tribe or band in this state may choose to administer, at the county or tribal level, programs for older individuals that are funded under 42 USC 3001 to 3057n, 42 USC 5001 and 42 USC 5011 (b). If this is done, the county board or boards of supervisors or tribal governing body shall establish by resolution a county or tribal aging unit to provide the services required under this section. If a county board of supervisors or a tribal governing body chooses, or the county boards of supervisors of 2 or more contiguous counties choose, not to administer the programs for older individuals, the department shall direct the Area Agency on Aging that serves the relevant area to contract with a private, nonprofit corporation to provide for the county, tribe or counties the services required under this section.

Aging Unit; Powers and Duties. In accordance with state statutes, rules promulgated by the department and relevant provisions of 42 USC 3001 to 3057n and as directed by the county or tribal commission on aging, an aging unit:

(a) *Duties.* Shall do all of the following:

1. Work to ensure that all older individuals, regardless of income, have access to information, services and opportunities available through the county or tribal aging unit and have the opportunity to contribute to the cost of services and that the services and resources of the county or tribal aging unit are designed to reach those in greatest social and economic need.
2. Plan for, receive and administer federal, state and county, city, town or village funds allocated under the state and area plan on aging to the county or tribal aging unit and any gifts, grants or payments received by the county or tribal aging unit, for the purposes for which allocated or made.
3. Provide a visible and accessible point of contact for individuals to obtain accurate and comprehensive information about public and private resources available in the community which can meet the needs of older individuals.
4. As specified under s. 46.81, provide older individuals with services of benefit specialists or appropriate referrals for assistance.
5. Organize and administer congregate programs, which shall include a nutrition program and may include one or more senior centers or adult day care or respite care programs, that enable older individuals and their families to secure a variety of services, including nutrition, daytime care, educational or volunteer opportunities, job skills preparation and information on health promotion, consumer affairs and civic participation.
6. Work to secure a countywide or tribal transportation system that makes community programs and opportunities accessible to, and meets the basic needs of, older individuals.
7. Work to ensure that programs and services for older individuals are available to homebound, disabled and non-English speaking persons, and to racial, ethnic and religious minorities.
8. Identify and publicize gaps in services needed by older individuals and provide leadership in developing services and programs, including recruitment and training of volunteers, that address those needs.
9. Work cooperatively with other organizations to enable their services to function effectively for older individuals.
10. Actively incorporate and promote the participation of older individuals in the preparation of a county or tribal comprehensive plan for aging resources that identifies needs, goals, activities and county or tribal resources for older individuals.
11. Provide information to the public about the aging experience and about resources for and within the aging population.
12. Assist in representing needs, views and concerns of older individuals in local decision making and assist older individuals in expressing their views to elected officials and providers of services.

13. If designated under s. 46.27 (3) (b) 6., administer the long-term support community options program.
14. If the department is so requested by the county board of supervisors, administer the pilot projects for home and community –based long-term support services under s. 46.271.
15. If designated under s. 46.90 (2), administer the elder abuse reporting system under s. 46.90.
16. If designated under s. 46.87 (3) (c), administer the Alzheimer’s disease family and caregiver support program under s. 46.87.
17. If designated by the county or in accordance with a contract with the department, operate the specialized transportation assistance program for a county under s. 85.21.
18. Advocate on behalf of older individuals to assist in enabling them to meet their basic needs.
19. If an aging unit under sub. (1) (a) 1. or 2. and if authorized under s. 46.283 (1) (a) 1., apply to the department to operate a resource center under s. 46.283 and, if the department contracts with the county under s. 46.283 (2), operate the resource center.
20. If an aging unit under sub. (1) (a) 1. or 2. and if authorized under s. 46.284 (1) (a) 1., apply to the department to operate a care management organization under s. 46.284 and, if the department contracts with the county under s. 46.284 (2), operate the care management organization and, if appropriate, place funds in a risk reserve.

(b) Powers. May perform any other general functions necessary to administer services for older individuals.

#### (4) Commission on Aging.

##### (a) Appointment.

1. Except as provided under subd. 2., the county board of supervisors in a county that has established a single-county aging unit, the county boards of supervisors in counties that have established a multicounty aging unit or the elected tribal governing body of a federally recognized American Indian tribe or band that has established a tribal aging unit shall, before qualification under this section, appoint a governing and policy-making body to be known as the commission on aging.
2. In any county that has a county executive or county administrator and that has established a single-county aging unit, the county executive or county administrator shall appoint, subject to confirmation by the county board of supervisors, the commission on aging. A member of a commission on aging appointed under this subdivision may be removed by the county executive or county administrator for cause.

##### (b) Composition.

A commission on aging, appointed under par. (a) shall be one of the following:

1. For an aging unit that is described in sub. (1) (a) 1. or 2., organized as a committee of the county board of supervisors, composed of supervisors and, beginning January 1, 1993, advised by an advisory committee, appointed by the county board. Older

individuals shall constitute at least 50% of the membership of the advisory committee and individuals who are elected to any office may not constitute 50% or more of the membership of the advisory committee.

2. For an aging unit that is described in sub. (1) (a) 1. or 2., composed of individuals of recognized ability and demonstrated interest in services for older individuals. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.

3. For an aging unit that is described in sub. (1) (a) 3., the board of directors of the private, nonprofit corporation. Older individuals shall constitute at least 50% of the membership of this commission and individuals who are elected to any office may not constitute 50% or more of the membership of this commission.

(c) Terms.

Members of a county or tribal commission on aging shall serve for terms of 3 years, so arranged that, as nearly as practicable, the terms of one-third of the members shall expire each year, and no member may serve more than 2 consecutive 3-year terms. Vacancies shall be filled in the same manner as the original appointments. A county or tribal commission on aging member appointed under par. (a) 1. may be removed from office for cause by a two-thirds vote of each county board of supervisors or tribal governing body participating in the appointment, on due notice in writing and hearing of the charges against the member.

(c) Powers and duties.

A county or tribal commission on aging appointed under sub. (4) (a) shall, in addition to any other powers or duties established by state law, plan and develop administrative and program policies, in accordance with state law and within limits established by the department of health and family services, if any, for programs in the county or for the tribe or band that are funded by the federal or state government for administration by the aging unit.

Policy decisions not reserved by statute for the department of health and family services may be delegated by the secretary to the county or tribal commission on aging. The county or tribal commission on aging shall direct the aging unit with respect to the powers and duties of the aging unit under sub. (3).

(5) Aging Unit Director; Appointment. A full-time aging unit director shall be appointed on the basis of recognized and demonstrated interest in and knowledge of problems of older individuals, with due regard to training, experience, executive and administrative ability and general qualification and fitness for the performance of his or her duties, by one of the following:

(a) 1. For an aging unit that is described in sub. (1) (a) 1., except as provided in subd. 2., a county or tribal commission on aging shall make the appointment, subject to the approval of and to the personnel policies and procedures established by each

county board of supervisors or the tribal governing body that participated in the appointment of the county or tribal commission on aging. 2. In any county that has a county executive or county administrator and that has established a single-county aging unit, the county executive or county administrator shall make the appointment, subject to the approval of and to the personnel policies and procedures established by each county board of supervisors that participated in the appointment of the county commission on aging.

(b) For an aging unit that is described in sub. (1) (a) 2., the director of the county department under s. 46.215, 46.22 or 46.23 of which the aging unit is a part shall make the appointment, subject to the personnel policies and procedures established by the county board of supervisors.

(d) For an aging unit that is described in sub. (1) (a) 3., the commission on aging under sub. (4) (b) 3. shall make the appointment, subject to ch. 181.

## **Appendices**

Attach copies of comments received during public review of the plan.

Attach other documents that support the aging unit plan.