

County Aging Plan Template and Required Documents 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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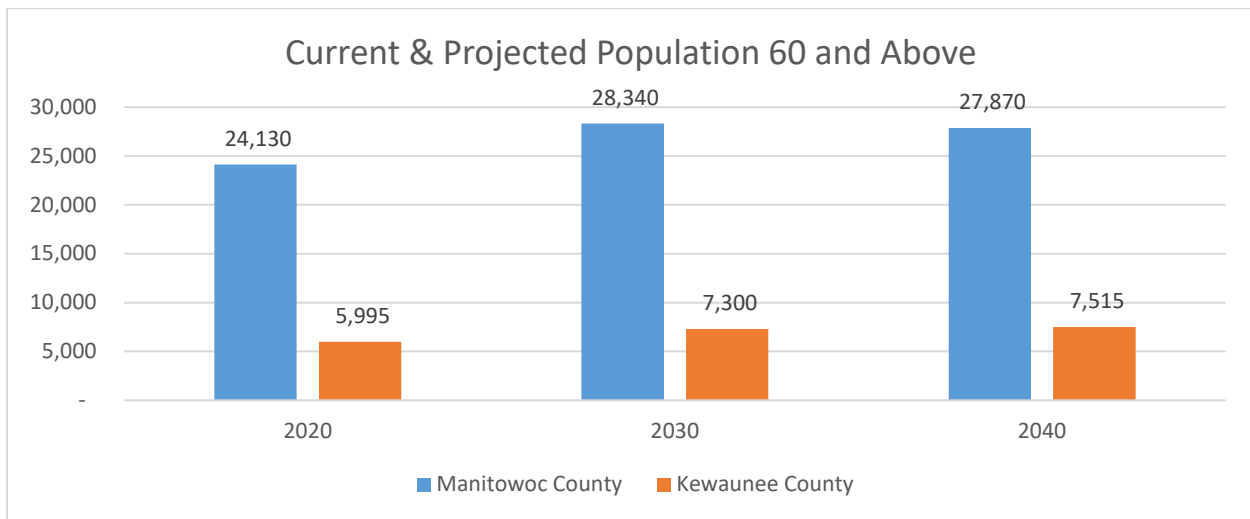
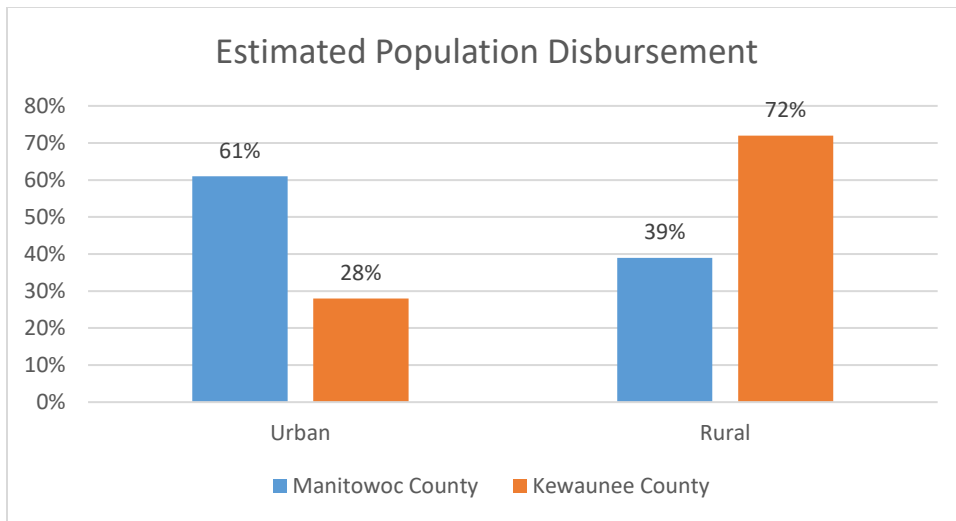
Executive Summary

Both Kewaunee and Manitowoc County mirror the national trend of rapid growth in our 65 and over populations. These trends indicate that the need for services provided by the Aging and Disability Resource Center of the Lakeshore will continue to increase and be in greater demand. In an attempt to be proactive with the pending increase, the ADRC of the Lakeshore has considered the future upward trend and has established goals that include current and future needs of the age 60 and older population.

By offering programs that support the aging population in the Kewaunee and Manitowoc communities, the ADRC of the Lakeshore promotes positive aging, empowerment, sustained independence, and removes the stereotype that aging is a disease. This support of the aging populations occurs through the following programs: the Nutrition Program providing nutritious meals, social connection, and nutrition education at congregate dining sites and home delivered meals; the Benefit Specialist Program which provides customers with accurate and current information about private and government benefits and programs that they may be entitled to receive; the Transportation program provides rides to customers for medical and nutrition-related appointments; the Caregiver Program connects caregivers to resources and tools to aid and assist with their role as caregiver; the Dementia Care Program promotes a dementia friendly community and connects customers who have dementia and their caregivers with dementia care tools and resources; the Preventions Programs which promote healthy living; and the Volunteer Opportunities which promote involvement of older people in aging-related program development, planning, and implementation. Needs that have been identified through community engagement and other analysis are continued Caregiver support, improving health and immunity through both education and providing immune healthy foods, diversity, increasing customer choice, and promoting the aging plan.

The United States Census Bureau data from July 2020 notes that those 65 and older make up 21.1% of Manitowoc County's total population and 20.9% of Kewaunee County's total population. The Department of Health Services projects that by 2040 these percentages will increase to 29.6% in Manitowoc County and 28.8% in Kewaunee County. When adjusted to age 60 and older, the projections for 2040 increase to 35.3% of the population in Manitowoc County and 35% of the population in Kewaunee County. This is a significant increase which brings to light the increasing responsibilities that will fall to the Aging Programs.

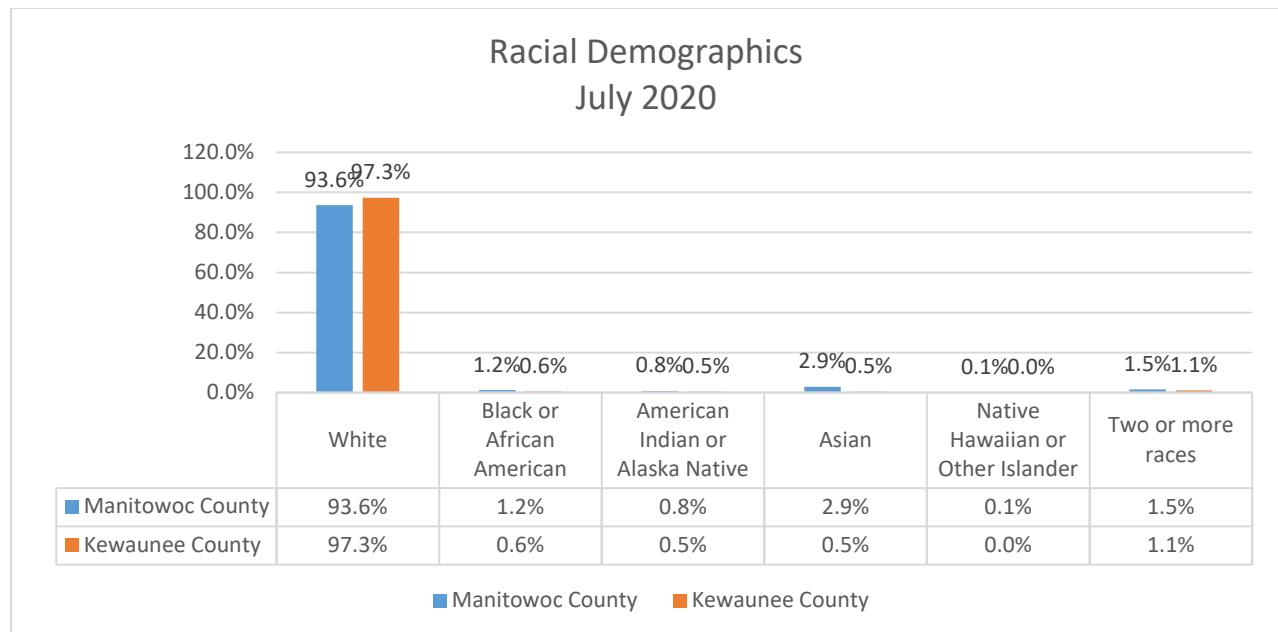
- Manitowoc County Current and Projected Population 60 and Above
 - o 2020 – 24,130 / 2030 – 28,340 / 2040 – 27,870
- Kewaunee County Current and Projected Population 60 and Above
 - o 2020 – 5,995 / 2030 – 7,300 / 2040 – 7,515
- Manitowoc County Estimated Population Disbursement
 - o Urban – 61% / Rural – 39%
- Kewaunee County Estimated Population Disbursement
 - o Urban – 28% / Rural – 72%



According to a 2020 AARP research report on Caregiving in the U.S., more than 1 in 5 Americans (21.3%) have acted as an unpaid caregiver at some time in the past 12 months. This is a significant increase from just five years ago (2015) when 18.2% of Americans acted as unpaid caregivers. Based on this same report, it can be estimated that there are approximately 13,668 unpaid eldercare caregivers in Manitowoc County and 3,454 unpaid eldercare caregivers in Kewaunee County. In both counties, provided eldercare averages 24.4 hours each week. These caregivers reduce nursing home placements and increase the ability for those 65 and older in need of supports to remain and thrive in their homes. In addition, this reduces financial impact on personal, county, state, and federal levels. The Aging Programs, including Caregiver programs, fill in support gaps and connect caregivers to resources and supports to maintain wellbeing and sustain the ability to continue care while the highest level of independence is sustained for the care recipient. Unfortunately, AARP notes that many caregivers report feeling physical, emotional, and financial strain. In 2020, more caregivers said that the stress associated with caregiving is negatively affecting their own health. The increased number of caregivers and stresses they face make it clear that support to caregivers continue to be a high priority.

A well-functioning immune system is critical for survival, and a 2019 article in Nutrients Journal of NCBI said that adequate and appropriate nutrition is required for all cells to function, including the cells in the immune system. Unfortunately, the immune response generally declines with age which results in an increased risk of both general illnesses, as well as poorer outcomes if one develops a chronic or acute disease according to a 2022 article by the Harvard T.H. Chan School of Public Health. The benefits of a strong immune system and the immunity deficiencies faced by the aging populations points to a clear need to provide both education on nutrition and immune healthy foods to our program participants.

While America's population is more racially diverse than ever, both Manitowoc and Kewaunee Counties are still predominately white when examining racial demographics. Because of that fact, special attention needs to be given in the areas of diversity and equity to ensure all populations are appropriately served. According to the United States Census Bureau data from July 2020 – Kewaunee County: White - 97.3%, Black or African American - 0.6%, American Indian or Alaska Native - 0.5%, Asian - 0.5%, Native Hawaiian or Other Islander - 0.0%, Two or more races - 1.1%. Manitowoc County: White - 93.6%, Black or African American - 1.2%, American Indian or Alaska Native - 0.8%, Asian - 2.9%, Native Hawaiian or Other Islander - 0.1%, Two or more races - 1.5%.



The ADRC of the Lakeshore outlined goals for the 2022-2024 Aging Plan are developed to improve and enrich the lives of the aging populations of both Kewaunee and Manitowoc Counties.

Context

The ADRC of the Lakeshore is a fully integrated regional ADRC since 2012 serving the aging and disabled populations of Kewaunee and Manitowoc counties. Services include information and assistance, options counseling, nutrition, prevention programs, caregiver services, transportation, and benefit specialist services.

The mission of the Aging & Disability Resource Center of the Lakeshore is to be a single source of information, assistance, and access to community resources for the aging population, people with disabilities, their families, and caregivers in the Kewaunee and Manitowoc County communities which is consistent with the Older Americans Act. The ADRC of the Lakeshore will assist customers in accessing public benefits to which customers are eligible. It will also serve as a link to direct services of the aging unit. The 2022-2024 Aging Plan was developed utilizing information gathered by the aging program specialists and coordinators, as well as information obtained through various community engagement efforts. A survey tool was made available to customers in several ways. Aging program staff gathered information by reaching out to customers of the ADRC of the Lakeshore by phone to explain the aging plan and review the survey questions. Members of the ADRC of the Lakeshore Board were also encouraged to reach out to community members to gather survey information with a survey questionnaire provided by the ADRC of the Lakeshore. The survey was also made available to customers via the ADRC website and Facebook page, and in the ADRC's bi-monthly newsletter. Additional information was gathered through both in-person and phone conversations between aging program specialists and customers during regular service related interactions. All completed surveys and gathered information were reviewed and utilized to develop the goals that represent the needs of the Kewaunee and Manitowoc aging populations.

The ADRC of the Lakeshore's outlined goals for the 2022 to 2024 Aging Plan were developed to improve and enrich the lives of the aging populations of both Kewaunee and Manitowoc Counties. The Director of the ADRC of the Lakeshore reviewed and approved the goals to be implemented in the 2022 to 2024 Aging Plan along with final review and support from the ADRC of the Lakeshore Board which includes representation from both Kewaunee and Manitowoc Boards.

Involving the aging population in determining the programming necessary to meet current and future needs of that population is extremely important. In an effort to enhance engagement of public for awareness of current plan goals and input for the development of future aging plans, the ADRC of the Lakeshore will promote/market the aging plan. This promotion will utilize already existing internal resources such as the ADRC of the Lakeshore Facebook page, website, and newsletter. Promotion will also be accomplished through staff appearances on a local radio station and by holding a virtual public hearing where the aging plan and goals are discussed. The goal is to enhance community engagement and input for the development of future Three Year Aging Plans.

Our effort to support Caregiver services will include providing education to Caregivers on transitioning out of the Caregiver Role. This will be accomplished by Caregiver Specialists researching and securing at least one transition presentation, providing at least one transition presentation at a Caregiver Support Network, and sending materials

from the presentation to Caregivers who are not able to attend. Additional support to Caregivers will be provided through education to Caregivers about legislation directly affecting Caregivers. This will be accomplished by gathering legislative updates, providing at least one legislative update presentation, and providing the presentation materials to anyone who is not able to attend. Support to Caregivers will also include organizing a trip to Aging Advocacy Days in Madison. This will involve planning the trip, developing marketing materials, educating attendees on the bills being addressed by legislators, and attending the event.

The ADRC of the Lakeshore Nutrition Program will strive to improve health and immunity through access to immune healthy foods and nutrition education. The ADRC of the Lakeshore's Registered Dietician will identify two (2) immune healthy foods to be added regularly to the C1/C2 menu. Nutrition Program staff will then work with the vendor to ensure that these food items are incorporated into the menu and provided for consumption. Nutrition education will be enhanced through collaboration between the Nutrition Team and Prevention Program Team by creating, marketing, and providing a combined Stepping-Up Your Nutrition and Stepping-On Class.

The Nutrition Program also will work towards utilizing Senior Farmers Market Vouchers to obtain and disburse fresh fruits and vegetables to homebound recipients of home delivered meals. After first discussing feasibility and obtaining approvals from all governing parties, partnerships will be formed with local farmers to develop plans for packaging and disbursement.

The ADRC of the Lakeshore understands that we are living in a more diverse society and will work to reduce barriers to equity within the aging population. At least one staff diversity/equity training will be scheduled each of the plan years and attended by at least 75% of staff. Staff discussions will then be facilitated after each training to identify new knowledge, concerns, and possible resolutions. A new Mind Over Matters class will be marketed with at least two marketing tools/materials displaying diversity. Once this class is facilitated a satisfaction survey will be completed by attendees.

Because it is incredibly important to maximize consumer control and choice in the aging population, the ADRC of the Lakeshore will offer and facilitate at least one evidence-based prevention class both virtually and in-person. The determination to run the classes simultaneously or separately will be based on conversations with other program providers and customers. The classes will be marketed on local radio and in local newspapers. Additional marketing will be done on the ADRC of the Lakeshore Facebook page, website, and newsletter.

The ADRC of the Lakeshore is dedicated to providing the necessary programming to meet the current and future needs of our aging population.

Aging Unit Director – Wendy Hutterer – ADRC of the Lakeshore Director
Combined Policy Making and Advisory Board – ADRC of the Lakeshore Board

- Co-Chairperson: Catherine Wagner
- Co-Chairperson: Linda Teske

Public Hearing Report

Date of Hearing: September 28 th , 2021 Kewaunee/ September 29 th , Manitowoc	County or Tribe: ADRC of the Lakeshore Kewaunee and Manitowoc
Location of Hearing: ADRC of the Lakeshore Manitowoc & Human Service Building Kewaunee	Accessibility of Hearing: X Location was convenient, accessible & large enough X Provisions were made for hearing/visual impairments <input type="checkbox"/> Provisions were made for those who do not speak English
Address of Hearing: 1701 Michigan Ave., Manitowoc 810 Lincoln Street, Kewaunee	X Hearings were held in several locations (at least one in each county your agency serves)
Number of Attendees: 1	X Hearing was not held with board/committee meetings
Public Notice: X Official public notification began at least 2 weeks prior? Date: 9/13/21_____ X Notice must be posted in a local/online newspaper, nutrition sites and senior centers plus at least one more avenue X*Print/online newspaper _____ X*Nutrition sites X*Senior centers X Newsletter, radio, TV, social media <input type="checkbox"/> Sent to partner agencies/individuals X Other ____FB Page and Website_____ X Notifications include X Date X Time X Location X Subject of hearing X Location and hours that the plan is available for examination <input type="checkbox"/> Where appropriate, notice was made available in languages other than English X A copy of the notice is included with this report	
Summary of Comments: Attendance was low. This is typically the results we receive with most of the county public hearings. In response to this, we have made it our goal to keep the public informed of the progress of the Aging Plan Goals throughout the next 3 years to promote involvement and investment of the community. We currently have plans to promote on a scheduled radio segment and post updates on our FB page and in our ADRC of the Lakeshore Newsletter.	
Changes made to your plan as a result of the input received: No changes suggested by 1 attendee or Advising Board. "The ADRC is doing good things for the community. I come here for help with my medicare coverage." "It's important to keep moving and visit people, get out and socialize."	



Wendy Hutterer, Department Director

wendyhutterer@manitowocountywi.gov

Manitowoc County Heritage Center • 1701 Michigan Avenue • Manitowoc WI 54220

Phone: 920.683.4180 • Fax: 920.683.2718 • Toll Free: 877.416.7083

Kewaunee County Office • 810 Lincoln Street • Kewaunee WI 54216

Toll Free: 877.416.7083 • Fax: 920.388.7044

3 Year Aging Plan Public Hearing Announcement

September 28th, 2021

4p.m. to 5p.m.

ADRC of the Lakeshore

Kewaunee Human Service Building

801 Lincoln Street, Kewaunee

September 29th, 2021

4p.m. to 5p.m.

ADRC of the Lakeshore

Heritage Building

1701 Michigan Ave., Manitowoc

Submitted by: Wendy Hutterer, Director

NOTICE OF PUBLIC HEARING

The ADRC of the Lakeshore will be conducting a public hearing for presentation of and comment on the 2022-2024 ADRC of the Lakeshore Aging Plan. Public hearing will be held at the following time and location: Tuesday, September 28th at 4:00 p.m. at the ADRC of the Lakeshore, 810 Lincoln Street, Kewaunee, WI 54216 in the Large Training Room.

The purpose of this public hearing is to provide an opportunity for citizens of Kewaunee County to comment and provide input on the Aging Plan draft. A draft of the 2022-2024 ADRC of the Lakeshore Aging Plan is available for examination at the ADRC of the Lakeshore office, 810 Lincoln Street in Kewaunee, from 8:00 a.m. to 4:30 p.m. Monday through Friday. Copies of the Aging Plan will also be available for viewing one hour prior to the start of each hearing at the location of the hearing.

Input received by members of the public at this hearing will be considered in the development of the final draft of this plan. The final draft will be presented for approval at the ADRC of the Lakeshore Board meeting scheduled for 10 am September 28, 2021 at the ADRC of the Lakeshore in the County Board Room. 1701 Michigan Avenue, Manitowoc.

Written comments may be sent to the ADRC of the Lakeshore office, 1701 Michigan Avenue, Manitowoc, WI 54220 Attn: Wendy Hutterer through September 24, 2021.

For more information, contact Wendy Hutterer, Department Director, at 877-416-7083. *If you are planning to attend the meeting and will require accommodations (signer, interpreter, etc.) to participate, please call the ADRC of the Lakeshore at least 48 hours prior to the meeting date and time. Toll Free: 877-416-7083.

NOTICE OF PUBLIC HEARING

The ADRC of the Lakeshore will be conducting a public hearing for presentation of and comment on the 2022-2024 ADRC of the Lakeshore Aging Plan. Public hearing will be held at the following time and location: Wednesday, September 29th at 4:00 p.m. at the ADRC of the Lakeshore, 1701 Michigan Avenue, Manitowoc, WI 54220 in the County Board Room.

The purpose of this public hearing is to provide an opportunity for citizens of **Manitowoc County** to comment and provide input on the Aging Plan draft. A draft of the 2022-2024 ADRC of the Lakeshore Aging Plan is available for examination at the ADRC of the Lakeshore office, 1701 Michigan Avenue in Manitowoc from 8:00 a.m. to 4:30 p.m. Monday through Friday. Copies of the Aging Plan will also be available for viewing one hour prior to the start of each hearing at the location of the hearing.

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Focus area: Advocacy and Title III E		Due Date
Goal statement: Support to Caregivers (Caregivers defined as those receiving NFCSP/AFCSF Services)		
Plan for measuring overall goal success – How will you know that you have achieved the results you want? Use data. Caregivers Provided with tools to transition out of Caregiving and Advocate for themselves		
Specific strategies and steps to meet your goal:	Measure (How will you know the strategies and steps have been completed?)	Due Date
Strategy 1: Transitioning out of Caregiving Role Education	At least 1 transition presentation at Caregiver Support Network	12/31/2022
Action step: Caregiver Specialist will research and secure at least 1 transition presentation	1 transition presentation secured	3/31/2022
Action step: At least 1 transition presentation completed @Caregiver Support Network	At least 1 presentation completed	12/31/2022
Action step: Materials from Presentation sent to Caregivers not able to attend Presentation	Materials sent to Caregivers under NFCSP/AFCSF Programming who did not attend presentation	12/31/2022
Strategy 2: Education Caregivers about legislation directly affecting Caregivers	Presented in person or through materials to Caregivers	12/31/2023
Action step: Set presentation dates at Caregiver Support Networks	At least 1 date set to present Legislative Updates	12/31/2023
Action step: Gather legislative updates	Legislative updates gathered from Janet Zander	12/31/2023
Action step: At least one legislative update presentation facilitated or materials provided to those that were not able to attend	At least one presentation completed or materials sent to Caregivers	12/31/2023
Strategy 3: Organizing trip to Aging Advocacy Days in Madison	Attendance at Aging Advocacy Days w/ @ least 5 participants	5/31/2024
Action step: Planning and Organizing of Trip	Securing a bus, offering partnership to Door County, registration completed	4/15/2024
Action step: Marketing Materials Developed and posted/submitted	Marketing posted on FB/Website, newspaper/newsletter submission	3/31/2024
Action step: Attending Aging Advocacy Days with preparation with attendees to provide the bills being addressed by legislators	At least 5 participants attend and all have been updated on bill items	5/2024
Annual Progress Notes:		

Focus area: Title IIIC		Due Date
Goal statement: To Improve health and immunity through Nutrition Education and Access to Immune Healthy Foods		12/31 2024
Plan for measuring overall goal success – How will you know that you have achieved the results you want? Use data. At least 2 Immune Healthy food items added to C1/C2 Menu and at least 1 Stepping Up Your Nutrition class partnered with a Stepping on Class		
Specific strategies and steps to meet your goal:	Measure (How will you know the strategies and steps have been completed?)	Due Date
Strategy 1: Immune Healthy foods placed on C1/C2 Menu	At least 2 Immune healthy foods placed on C1/C2 Menu	12/31 2022
Action step: RD identify 2 immune healthy foods to add to menu	2 Immune healthy food items chosen & shared w/ OAA Mngr. & Nut. Coordinator	3/31 2022
Action step: Work w/ Vendor to incorporate food items on Menu	1 meeting between RD and Food Vendor	4/30 2022
Action step: Food items on Menu for customer consumption	2 immune healthy food items on menu for customer to consume	6/30 2022
Strategy 2: Stepping Up Your Nutrition partnered with Stepping On Class	At least 1 Stepping On Class partnered w/ Stepping Up Your Nutrition	12/31 2023
Action step: Nutrition Team and Prevention Program Team collaborate to find a date and place for class	At least 1 planning meeting between Nutrition & Prevention Program Team	2/28 2023
Action step: Market Class	At least 3 marketing tools/outlets utilized	4/30 2023
Action step: Class Facilitated	At least one class completed	12/31 2023
Strategy 3:		
Action step:		
Action step:		
Action step:		
Annual Progress Notes:		

Focus area: Equity and Title IIID		Due Date
Goal statement: To reduce barriers to equity within the Aging Programs		12/31 2024
Plan for measuring overall goal success – <i>How will you know that you have achieved the results you want? Use data</i> At least one equity/diversity training offered and attended by 75% of our staff each year, 2022, 2023, 2024 along with at least one marketing presentation representing diverse groups each year for 2022, 2023, 2024		
Specific strategies and steps to meet your goal:	Measure (How will you know the strategies and steps have been completed?)	Due Date
Strategy 1: Staff Diversity/Equity Training Annually	Log of staff attendance at training	12/31/24
Action step: Management Team will research training opportunities and identify at least 2 options per year 2022,2023,2024	2 options identified and discussed	12/31 2022 2023 2024
Action step: At least one training will be scheduled with chosen presenter each year 2022,2023,2024	Attendance log for each training	12/31 2022 2023 2024
Action step: Staff discussion will be facilitated about training to identify new knowledge, concerns, and possible resolutions in 2022, 2023, 2024	Attendance log for each staff meeting or blue jean recording	12/31 2022 2023 2024
Strategy 2: New Class Mind Over Matters Class marketed with pictures displaying diversity	At least 2 marketing materials displaying diversity	12/31/24
Action step: Business Manager & Outreach Coordinator will research and identify at least 2 marketing opportunities/suppliers/materials that display diversity	2 supplies, materials, opportunities of marketing will be identified & secured	12/31 2022
Action step: At least 2 diverse marketing tools will be used to promote Mind Over Matters Class	2 diverse marketing tools will be displayed	12/31 2023
Action step: 1 Mind Over Matters Class Facilitated and satisfaction survey completed by attendees	Percentage of diverse attendees ie. Race, FPL, Location of Residence represents at least 2 groups identified as diverse	12/31 2024
Strategy 3:		
Action step:		
Annual Progress Note:		

Focus area: Maximizing Consumer Control and Choice/ Title IIID		Due Date
Goal statement: To increase customer choice and control by offering options		12/31/24
Plan for measuring overall goal success – <i>How will you know that you have achieved the results you want? Use data.</i>		
Specific strategies and steps to meet your goal:	Measure (<i>How will you know the strategies and steps have been completed?</i>)	Due Date
Strategy 1: Offer at least one evidenced base prevention program class both virtually and in person.	1 class, two options, offered with attendance of at least 5 in each class	12/31/22
Action step: Prevention Program Staff to meet and determine if classes will be run simultaneously or separately through conversations with other program providers and customers	Plan in place and both classes scheduled as decided upon	2/28/2022
Action step: Market class options on FB page, ADRC of the Lakeshore Website, ADRC of the Lakeshore Newsletter, Local Radio, and Local Newspaper	Marketing implemented	4/30/2022
Action step: Facilitate both classes as determined in first action step	At least 5 attendees in each class	12/31/2022
Strategy 2:		
Action step:		
Action step:		
Action step:		
Strategy 3:		
Action step:		
Annual Progress Note:		

Focus area: Enhance Engagement of Public Input for Development of Local Aging Plan		Due Date
Goal statement: To promote aging plan for increased public awareness of local goals within the aging plan		12/31 2024
Plan for measuring overall goal success – How will you know that you have achieved the results you want? Use data. Increase of 5% increase of completed surveys when planning 2025-2027 Aging Plan as compared to surveys from 2022-2024 Aging Plan and attendance at Public Hearings		
Specific strategies and steps to meet your goal:	Measure (How will you know the strategies and steps have been completed?)	Due Date
Strategy 1: Marketing 2 times a year internally with updates on goals status'	2 times a year posts will be presented ADRC FB Page, Website, and Newsletter	12/31/24
Action step: Work with outreach coordinator to develop posts and articles	Posts & articles completed & submitted 2 times 2022,2023,2024	8/31 2024
Action step: Submit posts to outreach coordinator to be placed on agency FB page, website, and in agency newsletter	Posts & articles completed & submitted 2 times 2022,2023,2024	8/31 2024
Action step:		
Strategy 2: Virtual Public Hearing	An increase of 5% attendance compared to in person from 2021	9/30/24
Action step: Secure virtual platform ie. Bluejeans and assure ability to facilitate meetings through practice runs	Blue Jeans secured and at least two practice runs for virtual meeting	8/31 2024
Action step: Market Virtual Hearing on Agency FB Page,Website & Newsletter, Local newspaper, and radio	At least one post, spot, or article in each	8/31 2024
Action step:		
Strategy 3: 2 times a year Aging Plan Promoted for upcoming plan 2025-2027 on local radio station	Present Upcoming Aging Plan 2 times on radio	8/31/24
Action step: Outreach Coordinator will book radio spots	2 radio spots booked in 2024	8/31 2024
Action step: Script for radio spots will be developed by OAA Manager	Script prepared for presentation	3/1 2024
Action step: Staff will assigned to radio spot and present on radio	2 staff identified and assigned to radio spots and presents	8/31 2024
Annual progress notes		

Focus area: Title IIIB and C1		Due Date
Goal statement: Senior Farmers Market Vouchers and produce disbursement to homebound through partnership between ADRC of the Lakeshore		
Plan for measuring overall goal success – (How will you know that you have achieved the results you want? Use data). 5% of the HDM recipients will receive fresh produce from partnership with local farmers		
Specific strategies and steps to meet your goal:	Measure (How will you know the strategies and steps have been completed?)	Due Date
Strategy 1: Research and Planning	Plan in place with approval from Director to move to Strategy 2	12/31/22
Action step: Check with Corp. Council for approval for ADRC Staff to serve as proxy	Call completed	3/31/2022
Action step: Call USDA for approval to have ADRC staff proxy for customers	Call completed	6/30/22
Action step: Call GWAAR for procedural guidance & develop procedure	Call completed and procedure developed	12/31/2022
Strategy 2: Build partnership with local farmers	At least one local farmer in Manitowoc or Kewaunee County willing to partner	12/31/23
Action step: Establish list of farmers	List of at least 3 local farmers with at least one from Kewaunee	3/31/2023
Action step: Create information letter for farmers with follow up phone call	Letters completed, mailed, and phone calls made to at least 3 farmers including at least one from Kewaunee	6/30/2023
Action step: In collaboration w/farmers establish packages and disbursement plan	Packages developed and disbursement plan created including at least 2 disbursement dates per customer for summer of 2024	12/31/2023
Strategy 3: Fresh fruits and vegetables delivered to homebound	At least 5% of HDM recipients receive at least fresh produce 2 times in the summer into fall season of 2024	10/31/2024
Action step: Confirm Farmer Partners & delivery dates	Farmer partners and dates confirmed	3/1/2024
Action step: Market through FB, Radio, Website, Newsletter, and local Newspaper	Marketing appears on FB, Radio, Website, Newsletter, & local Newspapers at least one time for at least a month	5/31/2024
Action step: Deliver to 5% of Homebound HDM customers 2 times per customer	5% of Homebound HDM customers receive fresh produce at least 2 times per customer	10/31/2024
Annual progress notes		

Primary Contact to Respond to Questions About the Aging Plan Template

Name: Wendy Hutterer

Title: Director

County: Manitowoc and Kewaunee

Organizational Name: ADRC of the Lakeshore

Address: 1701 Michigan Avenue

City: Manitowoc State: WI Zip Code: 54220

Email Address: wendyhutterer@manitowoccountywi.gov

Phone # 1-877-416-7083

Organizational Chart of the Aging Unit



Staff of the Aging Unit

Name: Wendy Hutterer Job Title: Director Telephone Number/email Address: 1-877-416-7083 wendyhutterer@manitowocountywi.gov
Brief Description of Duties: Oversees all staff and activities involved with the agency.
Name: Paul Hacker Job Title: Older Americans Act Program Manager and Supervisor Telephone Number/email Address: 1-877-416-7083 paulhacker@manitowocountywi.gov
Brief Description of Duties: It includes administrative duties, planning, promotion, coordination and supervision of various programs and services designed to serve people 60 and over at the ADRC of the Lakeshore Region
Name: Alyssa Weber Job Title: Registered Dietician Telephone Number/email Address: 1-877-416-7083 alyssaweber@manitowocountwi.gov
Brief Description of Duties: Reviews all menus to assure state defined nutritional values are maintained. Provides nutrition counselling and nutrition education to seniors and their caregivers.
Name: Rebecca Wasurick Job Title: Caregiver Specialist Telephone Number/email Address: 1-877-416-7083 rebeccawasurick@manitowocountywi.gov
Brief Description of Duties: Oversees and provides support to family caregivers, oversees the AFCSP and NFCSP Programs in Manitowoc County, and assists with organization of prevention programs.
Name: Lisa Van Remortel Job Title: Caregiver Specialist Telephone Number/email Address: 1-877-416-7083 lisavanremortel@manitowocountywi.gov
Brief Description of Duties: Oversees and provides support to family caregivers, oversees the AFCSP and NFCSP programs in Kewaunee County, and assists with organization of prevention programs.
Name: Jessica Knippel Job Title: Elder Benefit Specialist Telephone Number/email Address: 1-877-416-7083 jessicaknippel@manitowocountywi.gov
Brief Description of Duties: This position focuses on promoting and preserving the dignity, independence and financial security of older persons age 60 and over in ADRC of the Lakeshore region. Assists older persons in gaining access to benefits and legal rights.
Name: Marcia Dörner Job Title: Meal Site Manager Telephone Number/email Address: 1-877-416-7083 marciadorner@manitowocountywi.gov
Brief Description of Duties: Responsible for daily tasks related to HDM and Congregate meals, customer service, paperwork, trainings, and meetings.

Staff of the Aging Unit
Name: Angela Pietroske Job Title: Elder Benefit Specialist Telephone Number/email Address: 1-877-416-7083 angelapietroske@manitowocountywi.gov
Brief Description of Duties: This position focuses on promoting and preserving the dignity, independence and financial security of older persons age 60 and over in ADRC of the Lakeshore region. Assists older persons in gaining access to benefits and legal rights.
Name: Jessica Manley Job Title: Clerical Assistant Telephone Number/email Address: 1-877-416-7083 jessicamanley@manitowocountywi.gov
Brief Description of Duties: Provides support to Aging Services staff, answers phone, schedules appointments and does data entry.
Name: Cindy Richard Courtney Dassey Job Title: Nutrition Administration Telephone Number/email Address: 1-877-416-7083 cindyrichard@manitowocountywi.gov courtneydassey@manitowocountywi.gov
Brief Description of Duties: Manitowoc Senior Center Meal Site Manager. Clerical Support for Nutrition Program. HDM reassessments. Program development assistant.
Name: Kim Loose Cindy Richard Job Title: Nutrition Coordinator Telephone Number/email Address: 1-877-416-7083 kimloose@manitowocountywi.gov cindyrichard@manitowocountywi.gov
Brief Description of Duties: Oversees the home-delivered meal program, the congregate meal program, all staff and volunteers involved with the two programs, and provides nutrition education to seniors and their caregivers
Name: Kim Kracht Job Title: Clerical Assistant Telephone Number/email Address: 1-877-416-7083 kimkracht@manitowocountywi.gov
Brief Description of Duties: Provides support to Aging Services staff, answers phone, schedules appointments and does data entry.
Name: Teri Schroeder Alea Vandervelden Job Title: Clerical Assistant Telephone Number/email Address: 1-877-416-7083 terischroeder@manitowocountywi.gov aleevandervelden@manitowocountywi.gov
Brief Description of Duties: Provides support to Aging Services staff, answers phone, schedules appointments and does data entry.
Name: Kim Novak Job Title: Business Manager Telephone Number/email Address: 1-877-416-7083 kimnovak@manitowocountywi.gov
Brief Description of Duties: Supervision of clerical staff. Annual and monthly budget processing.
Name: Olivia Delikowski Job Title: Outreach Coordinator Telephone Number/email Address: 1-877-416-7083 oliviadelikowski@manitowocountywi.gov
Brief Description of Duties: Promotes agency and it's programs through various marketing methods while also recruiting for volunteers
Name: Kim Robertson Job Title: Meal Site Manager Telephone Number/email Address: 1-877-416-7083 kimrobertson@manitowocountywi.gov
Brief Description of Duties: Responsible for daily tasks related to HDM and Congregate meals, customer service, paperwork, trainings, and meetings.

Aging Unit Coordination with ADRCs

The ADRC of the Lakeshore is a fully integrated regional ADRC serving both Kewaunee and Manitowoc Counties.

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.

Organization: The law permits one of three options. Which of the following permissible options has the county chosen?	Check One
(1) An agency of county/tribal government with the primary purpose of administering programs for older individuals of the county/tribe.	X
(2) A unit, within a county/tribal department with the primary purpose of administering programs for older individuals of the county/tribe.	
(3) A private, nonprofit corporation, as defined in s. 181.0103 (17).	
Organization of the Commission on Aging: The law permits one of three options. Which of the following permissible options has the county chosen?	Check One
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.	
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.	X
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.	
Full-Time Aging Director: 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?	Circle One Yes

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:

Name	Age 60 and Older	Elected Official	Year First Term Began

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

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

Note: In 2020, our COA and ADRC Board Combined with approval from State. (John Schnabl was primary contact for this transition)

Name	Age 60 and Older	Elected Official	Start of Service
Co-Chairperson: Catherine Wagner	Yes	Yes	2020
Co-Chairperson: Linda Teske	Yes	Yes	2020
Linda Langman	Yes	No	2020
Sandi Schleis-Ulmen	Yes	No	2020
Paul Ravet	No	No	2020
James Hathaway	Yes	No	2020
Shirley Fessler	Yes	No	2020
Charles Hagen Tim Jadowski	Yes	Yes	2020 2022
Joanne Lazansky	Yes	Yes	2020
Tim Nicholls	Yes	No	2020

Budget Summary

A	B	C	D	E	F	G	H	I	J	K
	Federal Contract Funds	Cash Match Funds	Other Federal Funds	Other State Funds	Other Local Funds	Program Income Funds	Total Cash Funds	In-Kind Match Allocations	Grand Total	
1										
2	Supportive Services	\$ 139,838.00	\$ 15,150.00	\$ 5,220.00	\$ 16,263.00	\$ 650.00	\$ 177,121.00	\$ 3,854.00	\$ 180,975.00	
3	Congregate Nutrition Services	\$ 180,176.00	\$ -	\$ -	\$ -	\$ 20,000.00	\$ 200,176.00	\$ 50,000.00	\$ 250,176.00	
4	Home Delivered Nutrition Services	\$ 307,540.00	\$ -	\$ 52,441.00	\$ -	\$ 2,500.00	\$ 180,000.00	\$ 300,000.00	\$ 842,481.00	
5	Health Promotion Services	\$ 9,714.00	\$ 280.00	\$ -	\$ -	\$ -	\$ 9,994.00	\$ 800.00	\$ 10,794.00	
6	Caregiver Services - 60+	\$ 67,505.00	\$ 12,030.00	\$ -	\$ -	\$ 350.00	\$ 79,885.00	\$ 5,400.00	\$ 85,285.00	
7	Caregiver Services - Underage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
8	Alzheimer's	\$ -	\$ -	\$ -	\$ 51,791.00	\$ -	\$ 51,791.00	\$ -	\$ 51,791.00	
9	Elder Abuse	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
10										
11	Grand Total	\$ 704,773.00	\$ 27,460.00	\$ 57,661.00	\$ 68,054.00	\$ 2,500.00	\$ 201,000.00	\$ 1,061,448.00	\$ 360,054.00	\$ 1,421,502.00
12										

Assurances of Compliance with Federal and State Laws and Regulations

On behalf of the county, we certify

___ the ___ ADRC of the Lakeshore _____

has reviewed Assurances of Compliance with Federal and State Laws and Regulations and assures activities identified within this document and the aging unit plan will be carried out compliance with Federal and State laws.

Catherine Wagner, Chairperson 10-20-2021
Signature and Title of the Chairperson of the Commission on Aging Date

Catherine Wagner 10-20-21
Signature and Title of the Authorized County Board Representative Date

Verification of Intent

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.

Catherine Wagner, Chairperson 10/20/2021
Signature and Title of the Chairperson of the Commission on Aging Date

Catherine Wagner, 10/20/2021
Signature and Title of the Authorized County Board Representative Date

ADRC of the Lakeshore Board Minutes
Tuesday, September 21, 2021
Manitowoc County Board Room

Cathy Wagner called the meeting to order at 10:00 a.m. Roll call was taken. Those present were: Jim Hathaway, Sandi Schleis-Ulmen, Linda Teske, Linda Langman, Tim Nicholls, Joanne Lazansky, and Cathy Wagner. Also present were: Wendy Hutterer, Kim Novak, Melissa Konop, and Paul Hacker. Excused: Paul Ravet, and Shirley Fessler. Charles Hagen Sr. was Absent.

Motion by Joanne Lazansky, second by Linda Langman, to approve the agenda as printed. Motion carried.

Motion by Linda Langman, second by Tim Nicholls, to approve the minutes from July 27, 2021. Motion carried.

Correspondence: None

Public Comment: None

The 2022 Budget was distributed and discussed. Motion by Sandi Schleis-Ulmen, second by Linda Langman, to combine ADRC and Older Adult and Transportation financial summaries and budget. Motion carried. Motion by Sandi Schleis-Ulmen, second by Joanne Lazansky, to approve the budget as presented. Motion carried.

The July 2021 Monthly Financial Summary was distributed and discussed.

Office Updates: Wendy Hutterer introduced the new OAA Manager, Paul Hacker. Paul is working two days per week in September and will be with us full time starting in October. We also hired a new I&A Specialist, Lauren Daun to fill a vacancy we had in Manitowoc.

Aging Updates: Wendy Hutterer gave an update on the Aging Plan. The goals are complete and approved by State. Public hearing will be held September 28th in Kewaunee and 29th in Manitowoc. Copy of goals given to all board members and reviewed.

Nutrition Report & Updates: The August 2021 nutrition report was distributed and discussed. The ADRC opened congregate meal sites on September 20th.

Transportation Updates: The 5310 Mobility Manager grant application was submitted the end of August. The 85.21 Specialized Transportation grant application is in process and is due December 17th. The two vans we replaced went to auction and were sold.

Legislative Updates: The ADRC should be receiving additional money through the American Rescue Plan Act sometime before the end of the year. Discussed protocols for conducting home visits/screens.

Upcoming Events: Wendy Hutterer reviewed events through the end of the year.

Next Meeting: There being no other business, Linda Langman made a motion to adjourn, seconded by Joanne Lazansky. The meeting adjourned at 11:25 am.

Respectfully submitted,

Kim Novak
ADRC Business Services Manager

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.

Community Engagement Report

Complete one worksheet for each separate method used to elicit input from the community. i.e. 12 interviews conducted can be compiled on one sheet. At least two methods must be used.

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: March 2021- July 2021
Target audience(s): ADRC Board	Number of Participants/ Respondents: 4
Describe the method used including partners and outreach done to solicit responses: Encouraged our board members to reach out to community members to gather input for surveys	
Describe how the information collected was used to develop the plan: Goals related to findings were: Virtual options for prevention programs and support groups. Support to caregivers through education and empowerment	
What were the key takeaways/findings from the outreach? Strong Network of Senior Activities Caregiver respite needed Highlighting Seniors for their contributions Zoom and other Virtual options help reduce social isolation	

Community Engagement Report

Complete one worksheet for each separate method used to elicit input from the community. i.e. 12 interviews conducted can be compiled on one sheet. At least two methods must be used.

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: March 2021- May 2021
Target audience(s): Caregivers	Number of Participants/ Respondents: 12
Describe the method used including partners and outreach done to solicit responses: Caregiver Specialists reached out to Caregivers utilizing ADRC resources for caregivers such as support groups, PTC, & respite. Conversations in person and over the phone were utilized to gather information.	
Describe how the information collected was used to develop the plan: Transportation Feeling included Wellbeing and self-care opportunities Elderly does not mean unable or old Access to activities in rural areas Fun events Not using technology or wanting to use technology	
What were the key takeaways/findings from the outreach? Input was utilized for the following goals: Both virtual and in person options for prevention programs in response to isolation concern and access in rural areas In person to continue as an options for those not wanting or able to use technology Aging advocacy days to empower and include the elderly in legislation affecting them Stepping on and Stepping up for wellness and self-care	

Community Engagement Report

Complete one worksheet for each separate method used to elicit input from the community. i.e. 12 interviews conducted can be compiled on one sheet. At least two methods must be used.

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: March 2021 – July 2021
Target audience(s): Manitowoc and Kewaunee County Residents	Number of Participants/ Respondents:
Describe the method used including partners and outreach done to solicit responses: Facebook Page posts were created to promote the aging plan and open opportunity and awareness that community support and input was welcomed. Included direction to the website link to complete an electronic survey or contact information to complete over the phone or on a paper copy sent via mail.	
Describe how the information collected was used to develop the plan: No information was collected	
What were the key takeaways/findings from the outreach? This was hard to measure because no one commented on FB. It did help us realize that next time we should add a question on the survey which will identify where the person heard about the aging plan and the surveys.	

Community Engagement Report

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: March 2021- May 2021
Target audience(s): Homebound	Number of Participants/ Respondents: 33
Describe the method used including partners and outreach done to solicit responses: <p>A random sample was chosen from Home Delivered Meal customers of the ADRC of the Lakeshore. A team of staff made phone calls to the random sample chosen. The Aging Plan was explained and the questions were reviewed with the customers willing to participate.</p>	
Describe how the information collected was used to develop the plan: Partnership with Farmers to get fresh produce into the hands of homebound individuals Both in person and virtual option for prevention classes Legislative preparation and updates to increase awareness of Caregiver and other possible bills Transitioning out of Caregiving Education	
What were the key takeaways/findings from the outreach? <ol style="list-style-type: none"> 1. Friends and Family repeatedly noted as very important for continuing to live independently 2. Transportation is a highly recognized obstacle for accessing programs in a rural area 3. HDM are recognized as a very useful service and greatly appreciated 4. Physical limitations such as mobility limit ability to attend programs 5. Too old to use virtual options and I don't want to learn was a common response In person is important option 6. Important to stay active 7. Social interaction important to reduce loneliness 8. Assistive Devices as a support to remain home 9. Challenges are Scams and COVID 10. Caregivers need education and time to relax 11. Age Friendly Communities respect and appreciate the older generation 12. An age friendly community includes neighbors that care 13. Being aware and informed is important 	

Community Engagement Report

Complete one worksheet for each separate method used to elicit input from the community. i.e. 12 interviews conducted can be compiled on one sheet. At least two methods must be used.

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: March 2021- May 2021
Target audience(s): Racial Diversity	Number of Participants/ Respondents: 2
Describe the method used including partners and outreach done to solicit responses: Training on Language Line to assist translation if needed Identified racially diverse clients through demographics to contact Phone calls completed to 8 clients, only 2 chose to complete the survey	
Describe how the information collected was used to develop the plan: Created an awareness of the minimal racial diversity present in our service population prompting us to take steps to be more inclusive “Family is very important and cares for me” Don’t like virtual Want to spend time with family and friends	
What were the key takeaways/findings from the outreach? Promoting prevention classes with marketing that displays a diverse population Educating staff yearly on equity and diversity	

Community Engagement Report

Complete one worksheet for each separate method used to elicit input from the community. i.e. 12 interviews conducted can be compiled on one sheet. At least two methods must be used.

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: March 10 th , 2021
Target audience(s): Manitowoc and Kewaunee County Residents	Number of Participants/ Respondents: Reaches 13,000-15,000 listeners
Describe the method used including partners and outreach done to solicit responses: Radio Spot WOMT	
Describe how the information collected was used to develop the plan: Information was not collected but helped us to understand that during our next Aging Plan development our survey will include the following question: Where did you first hear about the aging plan surveys?	
What were the key takeaways/findings from the outreach? Should include on the survey where they heard about the survey to help us identify if it was from our senior scene or radio spot, etc. if the survey was sent in or dropped off. We felt this was still a good use of outreach so that community members are aware of the aging plan. We have heard from some of our customers that they felt we were doing a great job and had nothing to add.	

Community Engagement Report

Complete one worksheet for each separate method used to elicit input from the community. i.e. 12 interviews conducted can be compiled on one sheet. At least two methods must be used.

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: April 2021 – July 2021
Target audience(s): 60 and over	Number of Participants/ Respondents: 3
Describe the method used including partners and outreach done to solicit responses: <p>Our bi-monthly newsletter reaches over 1200 community members in Kewaunee County. We provided information regarding the aging plan and a tear out survey to fill out and send in or drop off at our office. We included this in our April/May edition and June/July edition</p>	
Describe how the information collected was used to develop the plan: <p>There was a tear out survey that recipients could fill out and send back to our agency.</p>	
What were the key takeaways/findings from the outreach? <p>To remain living independently the following would be helpful: Support for caregivers through education, homecare for all economic levels, technology knowledge, support groups</p> <p>Obstacles to attending programs: transportation, shy, lack of awareness, program fees, lack of ongoing virtual classes outside of COVID,</p> <p>Age Friendly communities include: inclusivity, engaging, open minded, progressive, neighborhood outreach, easy access to transportation, safety, social time,</p> <p>Main issues for 60 and older: loneliness, social isolation, finances, vulnerability, transportation</p>	

Community Engagement Report

Complete one worksheet for each separate method used to elicit input from the community. i.e. 12 interviews conducted can be compiled on one sheet. At least two methods must be used.

Your County or Tribe: ADRC of the Lakeshore Manitowoc and Kewaunee Counties	Date/s of Event or Effort: March 2021- July 2021
Target audience(s): 60 plus	Number of Participants/ Respondents:
Describe the method used including partners and outreach done to solicit responses: A link was created on our website for community members to fill out electronically. Once the submitted the survey, it was directly emailed to Wendy Hutterer OAA Program Manager. The website link was promoted on FB, the radio spot, board meetings, to staff, and customers when in contact.	
Describe how the information collected was used to develop the plan: Mind Over Matters Class Stepping Up Your Nutrition Partnered with Stepping On Class Fresh Produce into the hands of the Homebound Virtual and in person options to reduce isolation for homebound	
What were the key takeaways/findings from the outreach? Concerns noted: social isolations, transportation limitations for rural areas HDM program so important for nutritional wellness Free High Speed Internet would be helpful Transportation Intellectual Stimulation Keep Mind and Body Working Visitors who really care	