

## DEPARTMENTAL ACTIVITIES & GOALS

### Continue short term fundraising

We will continue with fundraisers such as Taste of the Town, Singing Telegrams and our Rock-a-Thon in order to supplement county and grant funding. We will again celebrate Senior Center Month in September by doing a month long fundraising campaign. We will also heavily promote our Legacy Gift program in an effort to make more people aware that gifts and bequests can be made to Senior Services. Our goal this year is \$15,000.

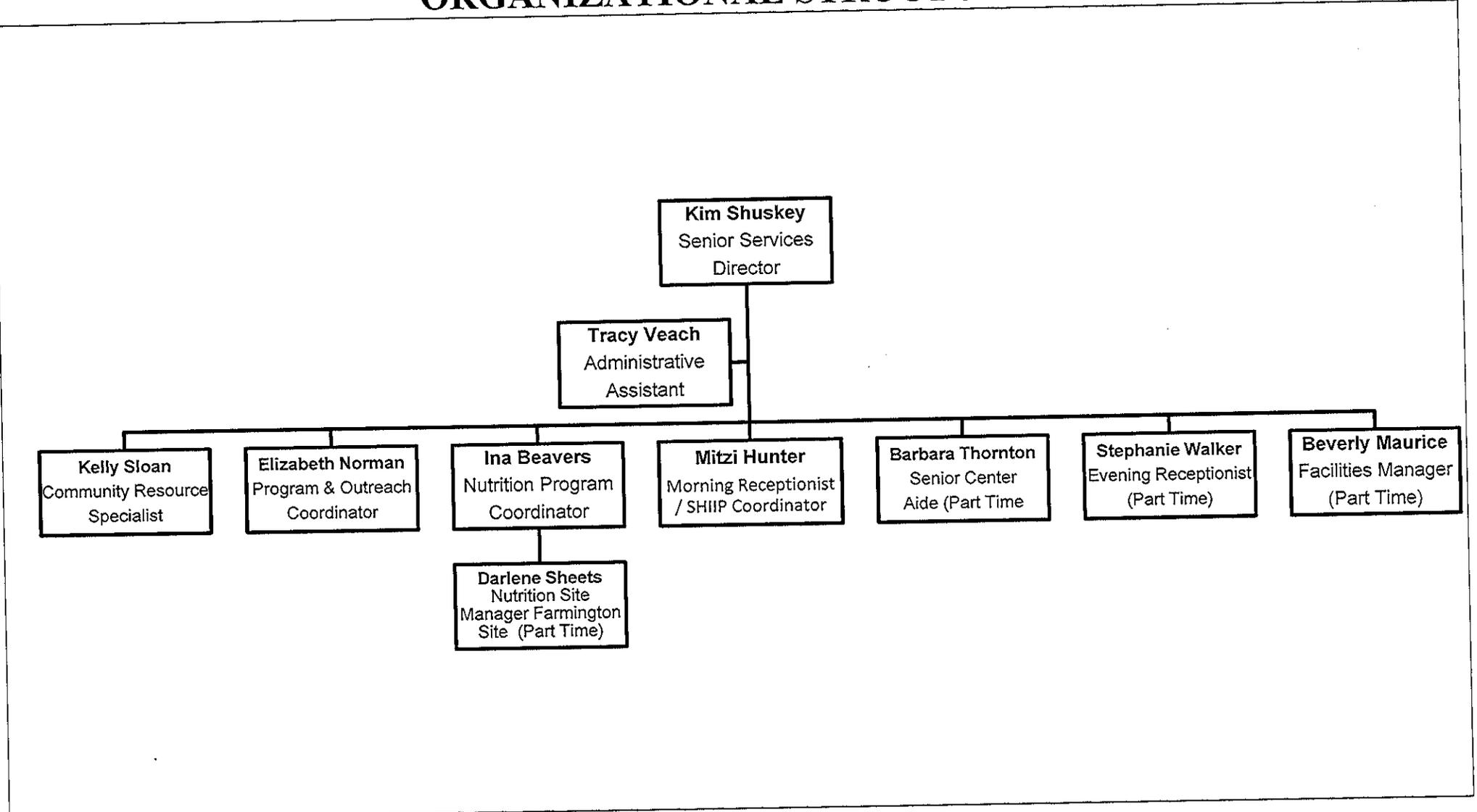
### Information & Options Counseling

The State has revised the Information and Assistance program to become Information and Options Counseling. In order to continue to receive funding we must have a certified Options Counselor and begin to provide this service no later than December, 2014. It is our intent for our Community Resource Specialist to complete the necessary training in order to obtain her certification.

### Senior Services Master Plan

We are in the process of developing a master plan for Senior Services regarding building expansion needs for the future. We will also identify funding requirements. We have requested funds for completion of Phase 1 and would like to begin a capital campaign this fiscal year to start raising funds toward Phase 2 expansion of our building.

# ORGANIZATIONAL STRUCTURE



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**REQUEST FOR NEW POSITION**

Title: Morning Receptionist / SHIIP Coordinator	Number: 1	Full-time <input checked="" type="checkbox"/> Temporary <input type="checkbox"/>	Annual Salary: 23,497
Hiring Date: Already hired Requesting f/t effective 07/01/14	1 <sup>st</sup> Year Cost: 36,111 (an additional \$19,754 from current cost)	2 <sup>nd</sup> Year Cost: 35,815	
Duties/Responsibilities of Position:			
<p>Position mans our front desk in the morning – answering phones, greeting participants, providing information to callers and visitors, clerical duties, data entry, responsible for total operations of the Senior Center every other Saturday, as she is only employee here.</p> <p>Position is also the SHIIP (Senior's Health Insurance Information Program) Coordinator for Davie County – This involves completing the course to become a certified SHIIP counselor, attending the new coordinator's training, attending the annual coordinator's conference, coordinating &amp; recruiting SHIIP volunteers, scheduling SHIIP meetings along with Regional Trainer, getting current information promptly to SHIIP volunteers, scheduling volunteers and matching volunteers with clients who need assistance, staying up to date on Medicare information, developing ways to promote the SHIIP program and getting SHIIP information out to beneficiaries. The position also requires being a SHIIP counselor which involves counseling Medicare beneficiaries to help them with questions about Medicare, Medicare supplements, prescription drug program, etc., screening beneficiaries to see if they qualify for subsidies for prescription drugs and screening for appropriate referrals to DSS for Medicaid benefits.</p>			
Justify Need for Position in Detail:			
<p>The position is currently filled as a 30 hr/week employee. She works every M-F 8am – 12pm at the front desk and every other Saturday from 9am – 1pm. This leaves 6 to 10 hours per week for her SHIIP Coordinator responsibilities. Because Medicare is such a complex issue, many counseling appointments take up to 2 hours. Most of her afternoon time is spent counseling clients, leaving no time for her other SHIIP Coordinator responsibilities. The extra time would allow her to devote more attention to the other details of her job, including promotion of the program (as required by the SHIIP grant), being able to better manage and assist her volunteers and more time to prepare for her appointments with research to be better prepared to help the clients.</p> <p>Due to changes and additional requirements in our Information &amp; Assistance program, the extra time will also allow her to be of more assistance in that program as well. Often times the SHIIP counseling appointment is the client's first step into the "system" of services for older adults. Many qualify or would benefit from additional services that are offered in our county. Having more time to devote to this program would allow the employee to better recognize those individuals and make them aware of what else is offered, therefore assisting our Community Resource Specialist with some aspects of her job.</p>			

## REQUEST FOR NEW POSITION

Cost of New Equipment/Furniture for Position:

None – SHIP funds have been/will be utilized in FY 13/14 to furnish the new office space that was created from an old storage room by moving contents to off-site storage. If additional equipment is needed in the future it is likely that the cost can be covered by the SHIP grant.

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## ACTIVITY JUSTIFICATION

Activity: Administrative/General Operating	Number of Employees 2	# of Full-time <u>1.7</u> # of Part-Time <u>0.3</u>	Annual Cost: \$93,773 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$92,145		Federal/State Cost: \$1,628 – Revenue from rentals pays salary of the p/t Facilities Mgr

**Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:**

- Kim Shuskey, Senior Services Director (70%)
- Tracy Veach, Administrative Assistant (75%)
- Mitzi Hunter, Morning Receptionist (27%)
- Stephanie Walker, Evening Receptionist (73% of p/t total work hours - 18/wk = .45 FTE = 33% FTE)
- Beverly Maurice, Facilities Manager (100% of p/t total work hours - 12/month = .075 FTE = .075% FTE)
- Front Desk Volunteers – 7 active (need 1 each day for 4 hours Monday – Thursday & 5 hours on Friday)

Director (70% of position)

- Provide oversight of all programs and services for Senior Services
- Supervise all staff of Senior Services including recruiting, hiring, training, coaching, assigning and evaluating work, disciplining and terminating or recommending termination
- Develop and direct all programs, activities and services carried out by the department
- Direct and participate in public relations to promote programs and services including the following:
  - Develop & conduct public presentations to groups and businesses, develop and type quarterly newsletter, develop and produce brochures and other promotional materials
- Provide leadership for volunteer efforts for older adults and volunteer opportunities for the community to serve older adults
- Develop working relationships with local and state agencies, public officials, senior adults and the general public
- Maintain proper and accurate records and generate necessary reports regarding the activities of the department, including, but not limited to an annual report, monthly, quarterly, bi-annual and/or annual grant reports
- Develop surveys of older adults to determine needs
- Identify and analyze local problems and needs of older adults and convert those into viable programs/services
- Represent the agency by serving on various local and/or state boards & committees currently including:
- Serve as Vice Chair of the NC Senior Center Alliance Committee, Davie Aging Planning Committee, NW Piedmont Falls Free Coalition
- Ensure all criteria are met to maintain certification as a NC Senior Center of Excellence
- Fill out SCOPE tool and compile all documentation for certification
- Develop training plans for all staff of Senior Services
- Ensure all programs are ran in accordance with all federal, state, regional, and local standards
- Participate in all monitoring visits from State and/or Area Agency on Aging
- Monitor changes in rules, regulations, policies & procedures on all levels that may affect older adults
- Establish new and modify existing policies and procedures for all programs and services for Senior Services
- Develop budgets and write all grants for Department and complete all related reports and paperwork
- Lead fundraising efforts for Department
- Reconcile monthly reports from Finance w/ databases kept here. Send list of corrections to be made to appropriate person.
- Develop Advisory Council agenda, edit minutes and send to each member in a timely manner
- Maintain list of capital outlay items
- Schedule all building rentals/usage by other departments
- Coordinate front desk volunteers
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required
- Cross train in other positions in department; Serve as backup to other staff

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Division \_\_\_\_\_**ACTIVITY JUSTIFICATION**

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Mandated by GS - NCGS # _____	County Cost: \$92,145		Federal/State Cost: \$1,628 - Revenue from rentals pays salary of the p/t Facilities Mgr

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Administrative Assistant (75% of position)

- Primary person to answer phones, transfer to appropriate person, take messages, etc. in afternoons
- Invoicing
  - Code bills for payment
  - Copy for our files & enter into database
  - Complete purchase orders when needed
- Deposit monies that come in to Senior Services
  - Reconcile all monies with receipts & fill out deposit slip
  - Copy for our files & enter into database
- Send out thank you notes and/or acknowledgements for donations received
- Order all supplies for department
- Maintain equipment for department
- Send in work requests for department to maintenance department
- Promotion of events
  - Write articles for various newspapers, magazines and other publications and submit as needed
  - Prepare flyers for activities and disseminate as appropriate into community
  - Keep literature on display current and stocked & keep copies of media publications for certification
- Mailing of newsletter each quarter
  - Prepare mailing labels for newsletter each quarter
  - Secure volunteers to help with labeling newsletter and assist them in doing so
  - Fill out appropriate forms for bulk mail and take to Post Office
- Assist Director in completing SCOPE process and application to maintain certification as a Senior Center of Excellence
- Take minutes for Advisory Council, type and send to Director for editing
- Serve as Safety Committee Representative for Department
  - Attend meetings
  - Complete safety sheets and turn in at meetings
  - Maintain MSDS sheets for department
  - Keep Safety Manual up-to-date
  - Check fire extinguishers and safety lights monthly
  - Prepare Monthly employee safety topic
- Serve as first backup person for receptionist/volunteer receptionist if they are not here
- Send sympathy and get well cards to clients/families as needed
- Pick up & distribute mail daily
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required to maintain NC Senior Center of Excellence status
- Cross train in other positions in the department; serve as backup to other staff

## ACTIVITY JUSTIFICATION

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Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*

Morning Receptionist (27% of position)

- Open up building each morning – unlock all doors, turn on TV’s, etc.
- Man front desk from 8:00am – 12:00pm each day & every other Saturday 9:00am – 1:00pm
- Primary person to answer phones, transfer to appropriate person, take messages, etc. in mornings
- Responsible for all operations at Senior Services every other Saturday (only staff there)
- Greet all participants, visitors that come in to Senior Services
- Ensure that all participants have signed in and assist if necessary in using the ServTracker sign in system
- Direct participants/visitors to proper rooms
- Ensure that all participants and/or potential participants have membership forms – Help to complete if necessary
- Sign up participants for events, either by phone or in person
- Give tours to any visitor who has not been before or who requests a tour
- Call participants to remind of next day’s activities
- Check local paper(s) for obituaries; Remove from ServTracker, mailing database & remove file from active files
- ServTracker Participant Management System
  - Turn on each day
  - Post units from previous day
  - Make sure all daily events are posted on screen
  - Add any clients from sign in sheets to ServTracker
  - Each quarter add any new events in ServTracker so that they will be ready for daily menu
- Manage the email newsletter distribution list - add new addresses, convert newsletter to PDF file & send out each quarter
- Membership packets
  - Compile new packets as needed
  - Add mailing information to newsletter database and/or email distribution list
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required to maintain NC Senior Center of Excellence status
- Cross train in other positions in the department; serve as backup to other staff

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**ACTIVITY JUSTIFICATION**

Activity: Administrative/General Operating	Number of Employees 2	# of Full-time <u>1.7</u> # of Part-Time <u>0.3</u>	Annual Cost: \$93,773 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$92,145		Federal/State Cost: \$1,628 – Revenue from rentals pays salary of the p/t Facilities Mgr

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Evening Receptionist (73% of position – p/t approx. 18 hrs/wk)

- Close building each evening – lock all doors, turn off TV's, etc.
- Man front desk from 4:00pm – 8:00pm Monday - Thursday evenings & every other Saturday 9:00am – 1:00pm
- Answer phones, transfer to appropriate person, take messages, etc.
- Responsible for all operations at Senior Services after 5:00pm each day (unless special event is occurring) & every other Saturday (only staff there)
- Greet all participants, visitors that come in to Senior Services
- Ensure that all participants have signed in and assist if necessary in using ServTracker sign in system
- Direct participants/visitors to proper rooms
- Ensure that all participants and/or potential participants have membership forms – Help to complete if necessary
- Sign up participants for events, either by phone or in person
- Give tours to any visitor who has not been before or who requests a tour
- ServTracker Participant Management System
  - Enter new clients into ServTracker
  - Turn system off each night
  - Switch touchscreen to reflect evening events at 5:00
- Monthly reports – Enter information (clients and units) into ServTracker each month for the following programs/services:
  - Family Caregiver Support Program, Information & Assistance, Legal Aide, Library books, Ensure, Personal Items (Fidget Aprons, walker aprons, bibs, etc.)
- Create monthly calendar for Mocksville site
- Re-shelve library books & keep shelves straightened
- Clean up rooms of ice, coffee and snacks left from day's activities
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required to maintain NC Senior Center of Excellence status
- Cross train in other positions in the department; serve as backup to other staff

Facilities Manager (100% of position – p/t approx. 12 hours/month)

- Open/close facilities for paid rentals
- Answer any questions renters have while here regarding use of the building
- Ensure renters are adhering to all rental policies during use of building
- Check to make sure everything is properly cleaned and returned to its proper place before renter leaves building
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required to maintain NC Senior Center of Excellence status
- Cross train in other positions in the department; serve as backup to other staff

## ACTIVITY JUSTIFICATION

Activity: Administrative/General Operating	Number of Employees 2	# of Full-time <u>1.7</u> # of Part-Time <u>0.3</u>	Annual Cost: \$93,773 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$92,145		Federal/State Cost: \$1,628 – Revenue from rentals pays salary of the p/t Facilities Mgr

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*

Volunteers (7 active – For first half of FY 13/14, volunteers have logged over 219 hours at the front desk)

- Man front desk from 12:00pm - 4:00pm Monday - Thursday afternoons & 12:00pm – 5:00pm Friday afternoons
- Greet all participants, visitors that come in to Senior Services
- Ensure that all participants have signed in and assist if necessary in using ServTracker sign in system
- Direct participants/visitors to proper rooms
- Ensure that all participants and/or potential participants have membership forms – Help to complete if necessary
- Sign up participants for events, either by phone or in person
- Assist staff with clerical duties such as filing, copying, editing information, etc.
- Assist with data entry when needed

Justify Need for Each Position in Detail (use additional pages if necessary):

Usage of the building and our services continues to rise each year. Our client base will also continue to increase. Here is the statistical information compiled by Swarna Reddy, NC Division of Aging and Adult Services, Dec 2013  
Source: American Community Survey 2008-2012, NC State Data Center:

- In 2012 we had 10, 077 persons in Davie County 60 and older which was 24.3% of the population.
- In 2032 that number is projected to be 13,561 or 32.3%.
- Davie County already has more persons 60 and older than 17 and younger. In 2012 the 60+ population exceeded the under 18 population by 778 people. In 2032 the number of older adults is projected to exceed the number of children by 4,706.
- For the past two years in Davie County, more than 500 people each year turned 55, the minimum age to participate in our programs.
- As Davie County continues to age, these trends will continue and demand for our programs and services will continue to rise.

Fiscal Year	# of Unduplicated Clients Served	# of units served/ Visits to Center
2010 – 2011	2830	82,791
2011 – 2012	2775	83,784
2012 – 2013	2810	85,232
July – Dec. 2013	1880	42,574*

\*As many of our large events occur during the 2<sup>nd</sup> half of the year, this is not indicative that we will serve less than last fiscal year. (CONTINUED)

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**ACTIVITY JUSTIFICATION**

Activity: Administrative/General Operating	Number of Employees 2	# of Full-time <u>1.7</u> # of Part-Time <u>0.3</u>	Annual Cost: \$93,773 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$92,145		Federal/State Cost: \$1,628 – Revenue from rentals pays salary of the p/t Facilities Mgr

Justify Need for Each Position in Detail (use additional pages if necessary):

- Due to the large number of visitors each day at Senior Services, the strict standards that we must adhere to for our services, and the varied programs and services provided, it is sometimes difficult to keep the office staffed to assist all clients, conduct all programs and provide all services.
- The Administrative Assistant's primary responsibilities in this area are invoices, deposits and promotion of events.
- Our receptionists are the first people that are seen when clients/participants walk in our doors and are also responsible for answering the phones. They are the critical point of first impressions and are relied upon to give out accurate information and ensure clients are signed in for reporting purposes. In addition, on Saturdays and in the evenings, they are totally responsible for the operations of the department, as they are the only staff on duty (unless a special event is occurring). Receptionists also help with many clerical duties.
- Our Facilities manager works only when there are paid rentals. Her salary is covered in the cost of the rental.
- Our volunteers man the front desk during those periods of time when we do not have a receptionist (Monday – Thursday afternoons from 12 – 4 and Friday afternoons from 12 – 5). As volunteers do not always report for their assigned time, all staff of Senior Services must fill in at the front desk when necessary if volunteers do not report for their assigned duties or if the receptionist is absent.
- The Director is responsible for oversight of all programs and activities of the department. She supervises all staff, ensures all programs are ran according to standards, develops all budgets and writes all grants in addition to providing hands-on services. In order to maintain certification as a NC Senior Center of Excellence a full time Director is required.
- All staff cross trains in other positions and often assists with other duties as needed.



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## ACTIVITY JUSTIFICATION

Activity: Congregate Meals - Mocksville site	Number of Employees 0.59	# of Full-time <u>0.59</u> # of Part-Time <u>0</u>	Annual Cost: \$31,035 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$29,448		Federal/State Cost: \$1,587

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

- Ina Beavers, Nutrition Program Coordinator (55%)
- Kim Shuskey, Senior Services Director (3%)
- Kelly Sloan, Community Resource Specialist (1%)
- Volunteers -- Use approximately 3 each day

Nutrition Program Coordinator (55 % of position)

- Provide general supervision of nutrition program
- Ensure Congregate Nutrition Program is ran in accordance with NC Division of Aging Nutrition Service Standards and NC Department of Health's Sanitation Code for Food Service Establishments
- Implement/help establish policies and procedures in regard to Nutrition Program
- Orient, train & schedule volunteers
- Supervise Experience Works position & congregated volunteers
- Work with caterer to discuss menus, resolve problems, etc.
- Make decision regarding closing during inclement weather -- contact caterer, clients & volunteers
- Type menus and calendars each month
- Conduct annual survey of participants
- Conduct annual monitoring of caterer
- Order/purchase all supplies related to congregated program
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required to maintain NC Senior Center of Excellence status
- Cross train in other positions in the department; serve as backup to other staff
- Serve as Nutrition Site Manager for Mocksville site
  - Oversee daily operations of congregated program
  - Maintain paperwork on each nutrition site client - keep updated as mandated by Nutrition Service Standards
  - Prep site to be ready for lunch program
  - Daily ordering of food from caterer
  - Receive food from caterer each morning, including taking temperatures and documenting
  - Serve meals to clients
  - Clean up from lunch
  - Count donations, record in receipt book and turn in for deposit
  - Ensure all clients and volunteers are entered into ServTracker and archive data daily
  - Plan daily programs including arranging for speakers, activities, etc.
  - Conduct daily programs when required

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**ACTIVITY JUSTIFICATION**

Activity: Congregate Meals - Mocksville site	Number of Employees 0.59	# of Full-time <u>0.59</u> # of Part-Time <u>0</u>	Annual Cost: \$31,035 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$29,448		Federal/State Cost: \$1,587

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Senior Services Director (3% of position)

- General supervisory, budgetary & oversight duties
- Participate in all monitoring visits conducted by State and/or Area Agency on Aging
- Prepare monthly report for preparation to enter into ARMS program and for billing from caterer
- Enter monthly data in ARMS program (State of NC's reporting program) regarding clients served, number of meals served, donations received, and client intake forms
- Prepare contracts for caterer annually
- Every 3 years, or more often if needed, bid out catering services:
  - Prepare bid packet & all forms necessary to bid out for caterer services
  - Chair bid review committee
  - Make recommendations to County Commissioners regarding who receives bid

Community Resource Specialist (1% of position)

- Serve as a backup for Nutrition Program Coordinator in her absence

Volunteers (use approximately 3 each day) In the first half of FY 13/14, volunteers have logged over 489 hours in this area

- Participate in training regarding volunteer assignment
- Assist Nutrition Program Coordinator in the following:
  - \*Serve meals to clients
  - \*Clean up from lunch
  - \*Conduct daily programs when required

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**ACTIVITY JUSTIFICATION**

Activity: Congregate Meals - Mocksville site	Number of Employees 0.59	# of Full-time <u>0.59</u> # of Part-Time <u>0</u>	Annual Cost: \$31,035 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$29,448		Federal/State Cost: \$1,587

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*

Justify Need for Each Position in Detail (use additional pages if necessary):

According to the NC Division of Aging Nutrition Service Standards (rev. July 1, 2003), Nutrition services are intended to :

- Promote, maintain & improve the health and well being of older adults through the provision of a nutritionally balanced meal five or more days per week served in a strategically located congregate setting or delivered to the home
- Reduce the isolation experienced by many older adults through opportunities for social interaction by participation in the nutrition program
- Provide nutrition education & supportive service activities in order to enhance the older adult's ability to remain independent
- Enable impaired older adults to remain at home as long as possible and facilitate the discharge of older adults from hospitals and care providing facilities

Also According to the NC Division of Aging Nutrition Service Standards (rev. July 1, 2003):

Nutrition providers must provide enough staff to operate the program, including a nutrition program director and, if funded for congregate nutrition, a site manager.

Fiscal Year	# Unduplicated Clients Served in Congregate Meals Program	# of Meals Served
2010 – 2011	129	7843
2011 - 2012	137	8302
2012 – 2013	155	9687
July – Dec, 2013	114	4733

- By having the Nutrition Program Coordinator serve also in the site manager's role we are able to fulfill all the requirements of the service standards while making the best use of her time.
- Volunteers are used to help serve the meals & clean up afterwards. Other staff steps in to help in these areas if volunteers are not available.
- This program has seen an increase each year for the past several years. We saw an incredible growth from 11/12 to 12/13, with an increase of 1,385 meals. It appears that this year's numbers will be close to that amount. Space constraints are an issue on certain days of the week.

DAVIE COUNTY  
ANNUAL BUDGET ESTIMATE - SUMMARY OPERATIONAL EXPENSE REQUEST

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Department: Senior Services - Congregate

Account No.	Item	Remarks	Requested		Recommended	
			Local Cost	Non-Local Cost	Local Cost	Non-Local Cost
55210 530120	Postage	0.4% (.8% of newsletter)	27			
55210 530250	Printing & Binding	0.7% (.8% of newsletter)	48			
55210 530320	Office Supplies	15% (Intake forms & records)	675			
55210 540100	Education & Training	29% (required training for Nutrition Prog. Coord - pd for by revenues earned)		175		
55210 540450	Purchased Services	4.1% (Private Pay Congregate Meals - \$1000 pd for by revenues earned, 32% of MIS charges from AAA - \$147, 50% of health inspection fee - \$60)	207	1000		
55210 541540	Computer Services	10% (Webhosting for ServTracker)	312			
55210 550160	Equip. Mtn	8.5% (15% of copier mtn.)	390			
55210 580640	Building Improvements	12.5 % of building addition - drive under canopy - partially pd for by donations received	100000			
55210205 530320	Office Supplies	100% (supplies for programs - pd for by HCCBG grant, NSIP funds and cost sharing)		2000		
55210205 540100	Education & Training	100% (required trng for Nut. Prog. Coord. - pd. for with HCCBG grant, NSIP funds and cost sharing)		300		
55210205 540450	Purchased Services	100% (Meals - pd for with HCCBG grant, NSIP funds, cost sharing and donations)		33565		
<b>Totals</b>			101659	37040		

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**ACTIVITY JUSTIFICATION**

Activity: Ensure Program	Number of Employees 0.09	# of Full-time <u>0.09</u> # of Part-Time _____	Annual Cost:  \$4,687
Mandated by GS - NCGS # _____	County Cost: \$57		Federal/State Cost: \$4,630

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

Kelly Sloan, Community Resource Specialist (8%)  
Kim Shuskey, Senior Services Director (1%)

Community Resource Specialist (8% of position)

- Conduct intake assessment of clients & reassessments as required by NC Div. of Aging Nutrition Service Standards
  - \*Determine eligibility for service
  - \*Complete paperwork as required by NC Division of Aging Nutrition Service Standards
  - \*Assess other needs of the clients and refer to proper agency
- Order Ensure each month & deliver Ensure to those clients who cannot pick up or have someone to pick up for them
- Participate in all monitoring visits conducted by the Area Agency on Aging

Senior Services Director (1% of position)

- General supervisory, budgetary & oversight duties
- Participate in all monitoring visits conducted by the Area Agency on Aging
- Develop budget and write grant for Ensure program
- Monitor units served to ensure spending is on track
- Enter monthly data in ARMS program (State of NC's reporting program) regarding clients served, client intake forms and donations received

Justify Need for Each Position in Detail (use additional pages if necessary):

Fiscal Year	# of Clients Served in Ensure Program	# of Units Provided
2010 - 2011	79	9972
2011 - 2012	67	10,764
2012 - 2013	64	10,608
July - Dec. 2013	63	5,724

The Ensure program is a natural continuation of the Home Delivered & Congregate meals program. For those clients whose doctor prescribes extra nutrition and who meet the qualifications of the program, we are able to provide the product at no cost to them. Staff time is minimal for the program.

DAVIE COUNTY  
ANNUAL BUDGET ESTIMATE - SUMMARY OPERATIONAL EXPENSE REQUEST

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Department: Senior Services - Ensure

Account No.	Item	Remarks	Requested		Recommended	
			Local Cost	Non-Local Cost	Local Cost	Non-Local Cost
55210 530120	Postage	0.2% (.4% of newsletter)	14			
55210 530250	Printing	0.3% (.4% of newsletter)	24			
55210 530310	Vehicle Gas & Oil	3% - Delivering Ensure	69			
55210 530320	Office Supplies	5% - Intake Forms	225			
55210 540450	Purchased Services	.2% (13% of MIS charges from AAA)	60			
55210 550160	Equip. Mtn	2.8% (5% of Copier Mtn agreement)	130			
55210210 530330	Department Supplies	Ensure - pd. for with HCCBG grant		2927		
<b>Totals</b>			522	2927		

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**ACTIVITY JUSTIFICATION**

Activity: Farmington site (Meals & Activities)	Number of Employees 0.60	# of Full-time <u>0.22</u> # of Part-Time <u>0.38</u>	Annual Cost: \$16,519
Mandated by GS - NCGS # _____	County Cost:  \$16,519	Federal/State Cost:	

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

Darlene Sheets – Farmington (100% of p/t total work hours 15/week= .375FTE = 37.5% FTE)  
 Ina Beavers, Nutrition Program Coordinator (3%)  
 Kim Shuskey, Senior Services Director (2%)  
 Elizabeth Norman, Program & Outreach Coordinator (17%)

Nutrition Site Manager- Farmington (100% of p/t position – total hours worked - 15/week)

- Oversee daily operations of congregate program
- Maintain paperwork on each nutrition site client - keep updated as mandated by Nutrition Service Standards
- Prep site to be ready for lunch program
- Daily ordering of food from caterer
- Receive food from caterer each morning, including taking temperatures and documenting
- Serve meals to clients
- Clean up from lunch
- Count donations, record in receipt book and turn in for deposit
- Plan daily programs including arranging for speakers, activities, etc.
- Conduct daily programs when required
- Ensure that all sanitary standards are upheld and make corrections as necessary
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required to maintain NC Senior Center of Excellence status

Nutrition Program Coordinator (3% of position)

- Provide general supervision of nutrition program & of Farmington's site manager
- Implement/help establish policies and procedures in regard to Nutrition Program
- Work with caterer to discuss menus, resolve problems, etc.
- Make decision regarding closing during inclement weather -- contact caterer, clients & volunteers
- Type menu each month
- Type calendar each month
- Conduct annual survey of participants
- Conduct annual monitoring of caterer
- Tally paperwork at the end of each month regarding meals ordered, meals served, etc.

(CONTINUED)

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**ACTIVITY JUSTIFICATION**

Activity: Farmington site (Meals & Activities)	Number of Employees 0.60	# of Full-time <u>0.22</u> # of Part-Time <u>0.38</u>	Annual Cost: \$16,519
Mandated by GS - NCGS # _____	County Cost:  \$16,519	Federal/State Cost:	

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Senior Services Director (2% of position)

- General supervisory, budgetary & oversight duties
- Participate in all monitoring visits conducted by State and/or Area Agency on Aging
- Develop budget for Farmington program
- Help to plan at least one activity per week for Farmington site to be advertised in the Newsletter
- Prepare monthly report for preparation to enter into ARMS program and for billing from caterer
- Enter monthly data in ARMS program (State of NC's reporting program) regarding clients served, number of meals served, donations received, and client intake forms
- Prepare contracts for caterer annually
- Every 3 years, or more often if needed, bid out catering services:
  - Prepare bid packet & all forms necessary to bid out for caterer services
  - Chair bid review committee
  - Make recommendations to County Commissioners regarding who receives bid

Program & Outreach Coordinator (17% of position)

- Help to plan at least one activity per week for Farmington site to be advertised in the Newsletter, including securing speakers, arranging entertainment, planning refreshments, etc.
- Purchase supplies necessary for conducting events at Farmington
- Conduct programs at Farmington site when necessary

Justify Need for Each Position in Detail (use additional pages if necessary):

Fiscal Year	# of Unduplicated Clients Served at Farmington site	# of Meals Provided/Visits Made
2010 - 2011	93	2339
2011 - 2012	77	1833
2012 - 2013	85	1880
July - Dec. 2013	60	1213

The Farmington site fills the need for those in Farmington who do not wish to come to the Mocksville site. We try to offer a sample of things that are at the Mocksville site - exercise classes, bingo, social events and the daily lunch program. Although participation is not high, the regulars who come enjoy it immensely.



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**ACTIVITY JUSTIFICATION**

Activity: Family Caregiver Support Program	Number of Employees 0.39	# of Full-time <u>0.39</u> # of Part-Time _____	Annual Cost: \$20,256
Mandated by GS - NCGS # _____	County Cost: \$20,256		Federal/State Cost:

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

Kelly Sloan, Community Resource Specialist (35%)  
Kim Shuskey, Senior Services Director (4%)

Community Resource Specialist (35% of position)

- Conduct intake assessment at the home of potential clients
  - Determine eligibility for service
  - Complete paperwork as required by NC Division of Aging Standards and Senior Services' policies and procedures
  - Assess other needs of the clients and refer to proper agency
- Implement/help establish policies and procedures in regards to the Family Caregiver Support Program
- Conduct reassessments as required by NC Div. of Aging Service Standards (at least once each year)
- Write vouchers each month for caregiver clients
- If client requests, contact agency of their choice to start referral process
- Ensure that vouchers written do not exceed monies allocated for the program
- As new subcontractors are added to program, or as rates change, send out contracts to these agencies
- Participate in all monitoring visits conducted by the Area Agency on Aging
- Attend quarterly FSCP regional meetings
- Conduct programs when needed regarding areas of caregiving and advance planning
- Conduct Caregiver Dinner each year
  - Plan menu and program/entertainment
  - Purchase all supplies, including paper goods & food
  - Cook food or secure caterer
  - Write article for paper & call or send invitation to all Caregiver clients

Senior Services Director (4% of position)

- General supervisory, budgetary & oversight duties
- Upon receipt of each bil reconcile number of hours (units) used against number of hours (units) billed
- Ensure that vouchers written do not exceed monies allocated for the program
- Conduct programs when needed regarding areas of caregiving and advance planning
- Develop budget and write grants for Family Caregiver Support Program
- Enter monthly data in ARMS program (State of NC's reporting program) regarding clients served, number of units served, donations received, client intake forms and client reassessments
- Participate in all monitoring visits conducted by the Area Agency on Aging
- Attend quarterly FCSP regional meetings

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**ACTIVITY JUSTIFICATION**

Activity: Family Caregiver Support Program	Number of Employees 0.39	# of Full-time <u>0.39</u> # of Part-Time _____	Annual Cost: \$20,256
Mandated by GS - NCGS # _____	County Cost: \$20,256		Federal/State Cost:

Justify Need for Each Position in Detail (use additional pages if necessary):

The Family Caregiver Program provides vouchers for unpaid caregivers to receive respite. The vouchers pay a professional home health aide to come in while the caregiver gets a break. It can also pay for a caregiver to place their loved in a facility temporarily if they are going out of town, or in adult day care temporarily while they get a break. The vouchers can also be used for incontinence supplies and nutritional supplements. Grants are available for every county and our agency has been selected to receive funding for the program since its inception. By having our Community Resource Specialist in charge of the program, she is able to ensure that clients receive assistance they need in other areas as well.

<u>Fiscal Year</u>	<u>Number of Unduplicated Clients Served in Family Caregiver Support Program</u>	<u># of Units Served</u>
2010 - 2011	57	1,398
2011 - 2012	56	1,724
2012- 2013	65	1,357
July - Dec. 2013	36	279

Demand has increased tremendously for this program since its inception. In order to meet the demand we have applied for, and received for the past 8 years, a grant from the Woodson Foundation to help supplement the funding received from the Family Caregiver Support Program grant. Due to the demand of the program, grant funds are used strictly for direct client assistance, not staff. However both funding sources have decreased for this program, therefore the units we have been able to provide have also decreased. Due to lapses in billing we numbers look much lower for the first half of this year, but once all bills are in, we expect to serve close to what we served last year, decreasing some due to cuts in funding.

DAVIE COUNTY  
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Department: Senior Services - Family Caregiver Support Program

Account No.	Item	Remarks	Requested		Recommended	
			Local Cost	Non-Local Cost	Local Cost	Non-Local Cost
55210 530120	Postage	1.3% - (.8% of newsletter - \$27, 6% general postage - \$54)	\$81			
55210 530250	Printing	.7% (.8% of newsletter)	\$48			
55210 530320	Office Supplies	10% - Intake Forms	450			
55210 540450	Purchased Services	5.2% - Contract agencies who provide respite/supplies \$1500 (pd. with endowment funds) & 2% of MIS charges from AAA - \$9	9	1500		
55210 540453	Prch. Srvs - Woodson	100% - Contract agencies who provide respite/supplies (pd for with Woodson grant)		6000		
55210 550160	Equip. Mtn	5.6% - (10% of Copier mtn. agreement)	260			
55210 560120	Special Events	3% - Caregiver related events and seminars and caregiver resources	1400			
55210208 540450	Purchased Services	100% - Contract agencies who provide respite/supplies - pd. for with FCSP grant & cost share		12902		
<b>Totals</b>			2248	20402		

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Division \_\_\_\_\_

## ACTIVITY JUSTIFICATION

Activity: Homebound Meals	Number of Employees 0.61	# of Full-time <u>0.61</u> # of Part-Time _____	Annual Cost: \$31,539 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$22,586		Federal/State Cost: \$8,953

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

- Kelly Sloan, Community Resource Specialist (35%)
- Kim Shuskey, Senior Services Director (3%)
- Ina Beavers, Nutrition Program Coordinator (23%)
- Homebound Meal Volunteers – at least 8 per day

### Community Resource Specialist (35% of position)

- Conduct intake assessment at the home of potential clients
  - Determine eligibility for service
  - Complete paperwork as required by NC Division of Aging Nutrition Service Standards and Senior Services' policies and procedures
  - Assess other needs of the clients and refer to proper agency
- Implement/help establish policies and procedures in regards to the Homebound Meals Program
- Conduct reassessments as required by NC Div. of Aging Nutrition Service Standards (at least every 6 months)
- Add client information in ServTracker and to route sheets
- Follow up with clients/emergency contacts of clients who are not home to receive meals
- Follow up with clients regarding violations of policies, concerns from volunteers, etc.
- Serve as primary back up for Nutrition Program Coordinator during her absence
- Deliver homebound meals as needed
- Participate in all monitoring visits conducted by the Area Agency on Aging
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required to maintain NC Senior Center of Excellence status
- Cross train in other positions in the department; serve as backup to other staff

### Senior Services Director -- (3% of position)

- General supervisory, budgetary & oversight duties
- Prepare monthly report for billing from caterer
- Verify that data entered in ServTracker and data on paperwork is consistent
- Enter monthly data in ARMS program (State of NC's reporting program) regarding clients served, number of meals served, donations received, and client intake forms
- Prepare contracts for caterer annually
- Every 3 years, or more often if needed, bid out catering services:
  - Prepare bid packet & all forms necessary to bid out for caterer services
  - Chair bid review committee
  - Make recommendations to County Commissioners regarding who receives bid
- Ensure all TILT (Time in Lieu of Temperature) forms are complete each quarter
- Serve as secondary backup for Nutrition Program Coordinator & Community Resource Specialist
- Participate in all monitoring visits conducted by the Area Agency on Aging

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**ACTIVITY JUSTIFICATION**

Activity: Homebound Meals	Number of Employees 0.61	# of Full-time <u>0.61</u> # of Part-Time _____	Annual Cost: \$31,539 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$22,586		Federal/State Cost: \$8,953

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*

Nutrition Program Coordinator (23% of position)

- Orient, train, schedule & supervise homebound volunteers
- Work with caterer to discuss menus, resolve problems, etc.
- Make decision regarding closing during inclement weather – contact caterer, clients & volunteers
- Type menu each month
- Tally paperwork at the end of each month regarding meals ordered, meals served, etc.
- Tally paperwork at the end of each month regarding mileage reimbursement for volunteers
- Conduct annual survey of participants
- Conduct annual monitoring of caterer
- Do public outreach talks regarding homebound meals programs & need for volunteers when necessary
- Serve as first backup for Community Resource Specialist regarding homebound meals in her absence
- Serve as Nutrition Site Manager for Mocksville site
  - Daily ordering of food from caterer
  - Receive food from caterer each morning, including counting meals, taking temperatures and documenting
  - Count donations, record in receipt book and turn in for deposit
  - Prepare all paperwork for drivers, including route sheets, mileage reimbursement forms, etc.
  - Complete all paperwork regarding clients served, meals delivered, etc.
  - Ensure all clients and volunteers are entered into ServTracker and archive data daily
  - Send out envelopes monthly for cost sharing
  - Prepare meal carrier bags each morning for use and clean each afternoon

Volunteers – (At least 8 per day) - \*\*All staff of Senior Services fills in for volunteers when needed\*\* - In the first half of FY 13/14 volunteers have logged over 2,292 hours in this area

- Participate in training regarding volunteer assignment
- Pick up food from Senior Services & deliver food to homebound clients
- Bring back all equipment and forms after delivering
- Report any problems or concerns about the clients to Senior Services' staff

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**ACTIVITY JUSTIFICATION**

Activity: Homebound Meals	Number of Employees 0.61	# of Full-time <u>0.61</u> # of Part-Time _____	Annual Cost: \$31,539 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$22,586		Federal/State Cost: \$8,953

Justify Need for Each Position in Detail (use additional pages if necessary):

According to the NC Division of Aging Nutrition Service Standards (rev. July 1, 2003), Nutrition services are intended to :

- Promote, maintain and improve the health and well being of older adults through the provision of a nutritionally balanced meal five or more days per week served in a strategically located congregate setting or delivered to the home
- Reduce the isolation experienced by many older adults through opportunities for social interaction by participation in the nutrition program
- Provide nutrition education and supportive service activities in order to enhance the older adult's ability to remain independent
- Enable impaired older adults to remain at home as long as possible and facilitate the discharge of older adults from hospitals and care providing facilities

Fiscal Year	# Unduplicated Clients Served	# of Meals Served
2010 - 2011	212	27,155
2011 - 2012	195	26,575
2012 - 2013	201	25,574
July - Dec. 2013	152	12,997

- Number of meals served for this program has remained fairly constant although funding has been cut for the past 2 years. For FY 14/15 if grant funds remain the same we will have to rely more on donations in order to allow us to meet budget.
- The Community Resource Specialist conducts intakes on all service program, including homebound meals. This helps to ensure that the clients receive not only the one service requested, but access to all services from which they might benefit. She is the one that goes out to the homes to ensure the services reach those in need.
- The Director provides oversight for all programs, ensuring they are ran in accordance to federal, state, regional and local standards. She creates the budget and related reports and writes the grants that fund the program.
- The Nutrition Program Coordinator is the one who implements the day to day operations of the program.
- Volunteers are used to deliver meals. As volunteers do not always report for their assignments, all staff of Senior Services must deliver meals when necessary if volunteers do not report for their assigned duties, or if a volunteer cannot be found to cover a route. With 8 routes each day this is sometimes difficult to cover and keep up with other duties.

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Department: Senior Services - Homebound Meals

Account No.	Item	Remarks	Requested		Recommended	
			Local Cost	Non-Local Cost	Local Cost	Non-Local Cost
55210 530120	Postage	0.4% (.8% of newsletter)	27			
55210 530250	Printing & Binding	0.7% (.8% of newsletter)	48			
55210 530310	Vehicle Gas & Oil	75% (In home assessments & delivering meals)	1733			
55210 530320	Office Supplies	15% (Intake forms & records)	675			
55210 540450	Purchased Services	1% (50% of MIS charges from AAA & 50% of health inspection fee)	290			
55210 541540	Computer Services	15% - Webhosting of ServTracker	468			
55210 550160	Equip. Mtn	19.3% (15% of copier mtn. agreement = \$390 & HB Bag Maintenance = \$500)	890			
55210 560121	Sp. Evts - Donations	To fund meals and special projects if needed for homebound clients - Pd for with money raised		15000		
55210 560530	Dues & Subscriptions	1% (MOWANC membership)	10			
55210204 520080	Workmens Compensation	100% of Homebound - pd for with HCCBG grant, NSIP, cost share & donations		95		
55210204 540140	Travel	100% (mileage reimbursement to volunteers - pd for with HCCBG grant, NSIP, cost share & donations)		28000		
55210204 540450	Purchased Services	100% (Meals - pd for with HCCBG grant, NSIP, cost share, endowment fund & donations)		92043		
<b>Totals</b>			4141	135138		

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**ACTIVITY JUSTIFICATION**

Activity: Information, Assistance And Options Counseling	Number of Employees 0.74	# of Full-time <u>0.62</u> # of Part-Time <u>0.12</u>	Annual Cost: \$29,324
Mandated by GS - NCGS # _____	County Cost: \$22,879		Federal/State Cost: \$6,445

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

Kelly Sloan, Community Resource Specialist (19%)  
 Tracy Veach, Administrative Assistant (5%)  
 Mitzi Hunter, Receptionist (27%)  
 Ina Beavers, Nutrition Program Coordinator (5%)  
 Elizabeth Norman, Program and Outreach Coordinator (3%)  
 Stephanie Walker, Receptionist (25% of p/t total work hrs. - 18/week = .45 FTE employee = 11.25% FTE )  
 Barbara Thornton, Senior Center Aide (2% of p/t total work hrs. - 12/week = .30 FTE employee = 0.6% FTE)  
 Kim Shuskey, Senior Services Director (3%)

Community Resource Specialist (19% of position)

- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards
- Provide Options Counseling to those who can benefit from the service
- Handle all phone calls/client walk-ins who need more detailed help other than just a simple phone number or agency name
- Provide clients with current information on opportunities and services available to them within their communities, including information relating to assistive technology
- Assess the problems and capacities of clients
- Link clients to the opportunities and services that are available
- Ensure that clients receive the services needed by the individuals by establishing adequate follow-up procedures
- Maintain up to date informational resource guides
- Advocate on behalf of older adults or their families to ensure needed assistance is received
- Maintain a proper and cooperative working relationship with other service providers in the community
- Attend appropriate committee meetings to facilitate networking with other agencies
- Participate in all training and activities as necessary to maintain options counseling certification
- Participate in all monitoring visits conducted by the Area Agency on Aging

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**ACTIVITY JUSTIFICATION**

Activity: Information, Assistance And Options Counseling	Number of Employees 0.74	# of Full-time <u>0.62</u> # of Part-Time <u>0.12</u>	Annual Cost: \$29,324
Mandated by GS - NCGS # _____	County Cost: \$22,879		Federal/State Cost: \$6,445

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Administrative Assistant (5% of position)

- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards

Morning Receptionist (27% of position)

- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards
- Enter all Information & Assistance information into ServTracker each month

Nutrition Program Coordinator (5% of position)

- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards

Program & Outreach Coordinator (3% of position)

- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards

Evening Receptionist (25% of position – p/t – total work hrs. approx. 18/week)

- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards

*(CONTINUED)*

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**ACTIVITY JUSTIFICATION**

Activity: Information, Assistance And Options Counseling	Number of Employees 0.74	# of Full-time <u>0.62</u> # of Part-Time <u>0.12</u>	Annual Cost: \$29,324
Mandated by GS - NCGS # _____	County Cost: \$22,879		Federal/State Cost: \$6,445

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Senior Center Aide (2% of position- p/t – total work hrs approx. 12/week)

- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards

Senior Services Director (3% of position)

- General supervisory, budgetary & oversight duties
- Develop budget and write grant for Information & Assistance program
- Enter monthly data in ARMS program (State of NC's reporting program) regarding clients served and donations received
- Submit monthly report for reimbursement of grant
- Participate in all monitoring visits conducted by the Area Agency on Aging
- Maintain daily log of information given to participants and the general public, including nature of contact, what information was given to them, and whether or not follow up is necessary as required by NC Information & Assistance Standards
- Fill out detailed Assistance Log when providing assistance to clients as required by NC Information & Assistance Standards

Justify Need for Each Position in Detail (use additional pages if necessary):

The State has changed this program effective July, 2014. Now in order to continue to receive funding we must have a certified Options Counselor on staff. Our Community Resource Specialist will become certified and we will do our best to handle this additional responsibility with current staff. There will be additional training, paperwork and reporting involved with this change. By increasing the hours for our Morning Receptionist/SHIIP Coordinator it is our hope that we can shift some responsibilities and she can help out a little more in this area.

According to the NC Division of Aging Information & Assistance Service Standards, Information and Assistance is a service designed to link persons with resources available to meet their needs and/or interests. It is also intended to be a mechanism to collect information about unmet needs and specific needed services in the geographic area and to share it with appropriate planners and decision makers. Options Counseling provides an individual with assistance in making a plan regarding long term services and support, making appropriate referrals for that individual if necessary & following up with that individual to ensure the process is successful.

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Division \_\_\_\_\_**ACTIVITY JUSTIFICATION**

Activity: Information, Assistance And Options Counseling	Number of Employees 0.74	# of Full-time <u>0.62</u> # of Part-Time <u>0.12</u>	Annual Cost:  \$29,324
Mandated by GS - NCGS # _____	County Cost: \$22,879		Federal/State Cost: \$6,445

Justify Need for Each Position in Detail (use additional pages if necessary):

<u>Fiscal Year</u>	<u># of Clients Served With I&amp;A Program</u>
2010 - 2011	2021
2011 - 2012	1472
2012 - 2013	1249
July - Dec. 2013	601

Information & Assistance is one of the most valuable roles Senior Services plays in the community. By having the Community Resource Specialist available and trained in many different areas, she is able to give out information about services and programs that are offered throughout the county. Other staff is available to give out simpler forms of information. Unfortunately the busier staff gets, the more likely they are to forget to document information given out. While the numbers have actually declined over the past few years call volume is not decreasing. We will soon have staff training to review the importance of documentation and the correct way to document information given to help ensure that we are appropriately capturing the extent of information we provide to the public.

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Department: Senior Services - Information, Assistance & Options Counseling

Account No.	Item	Remarks	Requested		Recommended	
			Local Cost	Non-Local Cost	Local Cost	Non-Local Cost
55210 530120	Postage	0.4% - (.4% of newsletter - \$14, 1% of general postage - \$9)	\$23			
55210 530250	Printing & Binding	0.3% - (.4% of newsletter)	\$24			
55210 530320	Office Supplies	5% - Log Sheets	225			
55210 550160	Equip. Mtn	2.8% (5% of Copier Mtn agreement)	130			
55210 560530	Dues & Subscriptions	13% - AIRS membership	100			
55210204 540100	Education & Training	100% - required training for I&A grant - pd for with HCCBG grant		275		
<b>Totals</b>			502	275		

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**ACTIVITY JUSTIFICATION**

Activity: Legal Aide Program	Number of Employees 0.02	# of Full-time <u>0.02</u> # of Part-Time _____	Annual Cost: \$1,163
Mandated by GS - NCGS # _____	County Cost: \$1,163		Federal/State Cost:

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

Kelly Sloan, Community Resource Specialist (1%)

Kim Shuskey, Senior Services Director (1%)

Community Resource Specialist (1% of position)

- Conduct intake assessment of clients
  - Determine eligibility for service
  - Complete paperwork as required by NC Division of Aging Legal Assistance Policies & Procedures
  - Assess other needs of the clients and refer to proper agency
- Make appointment with attorney of choice if client so requests
- Follow up with clients and/or attorneys if bills are not received in timely manner to ensure client received service
- Monitor attorneys as required by NC Division of Aging Legal Assistance Policies & Procedures
- Participate in all monitoring visits conducted by the Area Agency on Aging

Senior Services Director (1% of position)

- General supervisory, budgetary & oversight duties
- Develop budget and write grant for Legal Aide program
- Monitor units served to ensure spending is on track
- Enter monthly data in ARMS program (State of NC's reporting program) regarding clients served and donations received
- Participate in all monitoring visits conducted by the Area Agency on Aging

**ACTIVITY JUSTIFICATION**

Activity: Legal Aide Program	Number of Employees 0.02	# of Full-time <u>0.02</u> # of Part-Time _____	Annual Cost: \$1,163
Mandated by GS - NCGS # _____	County Cost: \$1,163		Federal/State Cost:

Justify Need for Each Position in Detail (use additional pages if necessary):

Legal services is a service required to have "on site" in order to obtain/retain certification as a NC Senior Center of Excellence". Having this certification means an increase in General Purpose funding (an increase of \$7,787 in 2013/2014)

According to the NC Division of Aging's Legal Assistance Policies & Procedures, Legal Assistance is intended to protect and secure the rights, benefits and dignity of older persons. Legal assistance services place particular emphasis on activities that assist all older individuals in understanding and maintaining their rights, exercising choice, realizing benefits and opportunities authorized by law and solving disputes.

<u>Fiscal Year</u>	<u>Number of Clients Served in Legal Aide Program</u>	<u># of Hours of Service Provided</u>
2010 - 2011	31	119
2011 - 2012	27	97
2012 - 2013	29	109
July - Dec. 2013	7*	24*

\* Clients & Hours Served are counted once bills are received for attorneys. As of the end of December an additional 9 clients were seen in the office & referred to attorneys. Each client averages 4 hours of service provided.

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Department: Senior Services - Legal

Account No.	Item	Remarks	Requested		Recommended	
			Local Cost	Non-Local Cost	Local Cost	Non-Local Cost
55210 530120	Postage	0.3% (.3% of newsletter costs - \$10, 1% of misc. mailings - \$9)	\$19			
55210 530250	Printing	0.3% (.3% of newsletter costs)	\$18			
55210 530320	Office Supplies	10% (paper & toner to copy Intake forms)	450			
55210 550160	Equip. Mtn	5.6% (10% of copier mtn)	260			
55210203 540450	Purchased Services	100% (Legal Services for Legal Aide program - pd for with Legal grant and cost share)		3486		
<b>Totals</b>			<b>747</b>	<b>3486</b>		

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Division \_\_\_\_\_

**ACTIVITY JUSTIFICATION**

Activity: Senior Center Activities & Other Services	Number of Employees 1.56	# of Full-time <u>1.26</u> # of Part-Time <u>.3</u>	Annual Cost:  \$58,633 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$58,633	Federal/State Cost:	

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

Elizabeth Norman, Program &amp; Outreach Coordinator (80%)

Kim Shuskey, Senior Services Director (10%)

Barbara Thornton, Senior Center Aide (98% of p/t total work hours 12/week = .30 FTE = 29% FTE)

Tracy Veach, Administrative Assistant (20%)

Ina Beavers, Nutrition Program Coordinator (14%)

Kelly Sloan, Community Resource Specialist (1%)

Mitzi Hunter, Receptionist (1%)

Stephanie Walker, Receptionist (2% of p/t total work hours 18/week = .45 FTE = 0.9% FTE)

Volunteers are used for speakers, instructors, and entertainment whenever possible, and to help get ready for events due to lack of staff time to assist

Program & Outreach Coordinator (80% of position)

- Develop, plan and coordinate senior center activities
  - Meet with other staff quarterly to brainstorm ideas and plan calendars for upcoming quarter
  - Secure speakers, entertainment, instructors, etc. needed for all events
  - Secure volunteers if necessary to help with event
  - Purchase all supplies needed for events including paper goods, food (or secure caterer), decorations, etc.
  - Cook food for events that involve meals (or secure caterer)
  - Set up and/or decorate room for events
  - Do all research necessary
  - Conduct event or program
  - Clean up after event
  - Write thank you notes to any volunteers, entertainers, presenters or instructors used
- Get movies for monthly movies, quarterly dinner & movie & quarterly intergenerational movie
- Drive minivan for monthly trips
- Complete budget sheets and event summaries after each program/event and turn in to Director
- Maintain certification & teach morning exercise programs (SilverHealth & Morning Wake-up Programs), including planning the routines and selecting appropriate music, ensuring exercises are safe and appropriate for senior adults
- Coordinate Destination Fitness Program
  - Assist YMCA in testing participants
  - Create log sheets and seminar sheets for each quarter
  - Contact participants whose time for testing is coming up to schedule
  - Tally log sheets at the end of each quarter and relay the information to that quarter's sponsoring agency
- Primary person to train and orient participants on fitness equipment
- Keep treadmills maintained
- Keep bottle of cleaner solutions filled
- Keep scales calibrated
- Sanitize ice machine every 6 months
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required
- Cross train in other positions in department; Serve as backup to other staff

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Division \_\_\_\_\_

**ACTIVITY JUSTIFICATION**

Activity: Senior Center Activities & Other Services	Number of Employees 1.56	# of Full-time <u>1.26</u> # of Part-Time <u>.3</u>	Annual Cost:  \$58,633 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$58,633	Federal/State Cost:	

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Director (10% of position)

- General supervisory, budgetary & oversight duties
- Identify and analyze local problems and needs of older adults and convert those into viable programs/services
- Ensure all criteria are met to maintain certification as a NC Senior Center of Excellence
- Establish new and modify existing policies and procedures for all programs and services for Senior Services
- Develop budgets and write all grants for Department
- Lead Fundraising Efforts for Department
- Conduct staff meeting quarterly to brainstorm ideas and plan calendars for upcoming quarter
- Assist with securing speakers, entertainment, instructors, etc. needed for all events
- Assist with cooking food for events that involve meals
- Assist with setting up and/or decorating room for events
- Assist with conducting event or program
- Assist with cleaning up after event
- Conduct handbell program monthly
- Take lead on developing and conducting larger events such as health fairs, regional events, etc.
- Maintain all paperwork for bowling league
- Maintain all contracts for contract employees

Administrative Assistant (20% of position)

- Set up rooms, including refreshments for daily/weekly activities
- Call all book club members the day before the meeting to remind and maintain log to check out book club books
- Train participants on fitness machines when needed
- Maintain Notary certificate and notarize documents for participants
- Meet with other staff quarterly to brainstorm ideas and plan calendars for upcoming quarter
- Assist with securing speakers, entertainment, instructors, etc. needed for events
- Assist with cooking food for events that involve meals when needed
- Assist with setting up and/or decorating room for events when needed
- Assist with conducting event or program when needed
- Assist with cleaning up after event when needed

(CONTINUED)

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**ACTIVITY JUSTIFICATION**

Activity: Senior Center Activities & Other Services	Number of Employees 1.56	# of Full-time <u>1.26</u> # of Part-Time <u>.3</u>	Annual Cost: \$58,633 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$58,633	Federal/State Cost:	

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Senior Center Aide (98% of p/t position – total work hours approx. 12/week)

- Schedule singing engagements for Chorus
- Coordinate Theatre Club
  - Facilitate monthly meetings
  - Make arrangements for outings (typically monthly)
  - Coordinate transportation for outings – either carpooling or driving county minivan
- Scrapbooking
  - Plan yearly scrapbooking crop day – secure speakers, plan games, provide refreshments
  - Coordinate monthly scrapbooking workshops – remind participants, help participants with layouts, designs, etc.
- Coordinate Monthly Day Trips
  - research destinations
  - arrange with destinations for group tours, etc.,
  - plan where to eat
- Coordinate Extended Trips (typically 2 per year)
  - research destinations
  - work out details with touring company
  - escort the trips
  - purchase snacks & prizes for travel
- Meet with other staff quarterly to brainstorm ideas and plan calendars for upcoming quarter
- Assist with setting up and cleaning up after event when needed
- Attend mandatory training regarding job specific training, safety training and topics on aging training as required
- Cross train in other positions in department; Serve as backup to other staff

Nutrition Program Coordinator (14% of position)

- Meet with other staff quarterly to brainstorm ideas
- Assist with cooking food for events that involve meals when needed
- Assist with setting up and/or decorating room for events when needed
- Assist with cleaning up after event when needed

(CONTINUED)

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Division \_\_\_\_\_

**ACTIVITY JUSTIFICATION**

Activity: Senior Center Activities & Other Services	Number of Employees 1.56	# of Full-time <u>1.26</u> # of Part-Time <u>.3</u>	Annual Cost: \$58,633 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$58,633	Federal/State Cost:	

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*Community Resource Specialist (1% of position)

- Coordinate the following programs
  - Fidget Aprons – Contact volunteers to make fidget aprons when running low, distribute aprons to those who request
  - Handmade Personal Items – Work with volunteers from 1<sup>st</sup> Baptist Church to keep items stocked and distribute to those who request
  - Vial of Life – Distribute information to those who would like the service, ensure that supplies stay stocked
  - Community Work Days – Compile a list of clients who would like a project done during one of these days, do intake form for the clients, have privacy statements/release agreements signed by all clients, provide information to the various organizations conducting the work days
- Meet with other staff quarterly to brainstorm ideas
- Assist with setting up and/or decorating room for events when needed
- Assist with cleaning up after event when needed

Morning Receptionist (1% of position)

- Assist with setting up and/or decorating room for events when needed
- Assist with cleaning up after event when needed

Evening Receptionist (2% of position – p/t – total work hours approx. 18/week)

- Assist with setting up and/or decorating room for events when needed
- Assist with cleaning up after event when needed

(CONTINUED)

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Division \_\_\_\_\_

**ACTIVITY JUSTIFICATION**

Activity: Senior Center Activities & Other Services	Number of Employees 1.56	# of Full-time <u>1.26</u> # of Part-Time <u>.3</u>	Annual Cost: \$58,633 + inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$58,633	Federal/State Cost:	

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*

Volunteers (Senior Center) – In the first half of FY 13/14, 74 volunteers have logged slightly over 440 hours in this area

- Assist with events (helping to cook food for events that involve meals, setting up and/or decorating room for events, cleaning up after event)
- Conducting event or program or teach class

Justify Need for Each Position in Detail (use additional pages if necessary):

Coordinating, planning, organizing and executing the massive number of programs, activities and classes that we have is an enormous responsibility. Our Program and Outreach Coordinator is the one responsible for the bulk of this responsibility. However, in addition to that, she also teaches classes and helps with other activities at Senior Services. Several staff helps in the planning stages and all staff generally help out with large events. A large event cannot be executed without the help of many hands. While we use volunteers when we can, many times it is necessary to use staff in order to ensure adherence to health code standards.

Fiscal Year	# of visits to Senior Center activities, etc.
2010 – 2011	25,395
2011 – 2012	25,138
2012 – 2013	26,558
July – Dec. 2013	13,094*

*(These numbers do not reflect visits to the center for volunteer purposes)*

\*Even though this reflects half of the year, some of the largest events happen in the second half of the year, so end of the year totals are expected to be more than last year's totals. We are at capacity in several events.

One of the largest areas of growth that we have seen is in Fitness. Of the 26,558 visits made to the Senior Center last year, 6,157 were to the fitness room. This is 461 more visits than in FY 11/12. Of the visits made to the Senior Center last year 7,038 were to organized exercise classes. This is 1,682 more visits than last year. While we have added additional classes to try to meet demand, our main limitation right now is space.



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**ACTIVITY JUSTIFICATION**

Activity: Seniors' Health Insurance Information Program (SHIIP)	Number of Employees 0.48	# of Full-time <u>0.48</u> # of Part-Time _____	Annual Cost:  \$18,226+ inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$18,226		Federal/State Cost:

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity:

Mitzi Hunter, Morning Receptionist/SHIIP Coord. (45%)

Kim Shuskey, Senior Services Director (3%)

SHIIP Volunteers – Currently have 3 active

Morning Receptionist/SHIIP Coord. (45 % of position)

- Serve as SHIIP Coordinator for Davie County
  - Match volunteer counselors with clients who need assistance
  - Follow up with counselors and/or clients to ensure client received assistance requested
  - Notify/remind counselors of quarterly training meetings
  - Attend quarterly training meetings
  - Help to plan SHIIP outreach events & prepare SHIIP information for such events
  - Help plan annual event recognizing all SHIIP volunteers
  - Keep track of all volunteer counselors' hours
  - Recruit and supervise SHIIP volunteers including interviewing & checking references
  - Prepare quarterly reports
  - Attend annual SHIIP Coordinator's 2 day conference
- Serve as a SHIIP counselor
  - Complete initial 24 hour training program
  - Attend quarterly training meetings
  - Counsel Medicare recipients & those who will soon be on Medicare by helping with any of the following:
    - Medicare parts A, B & D – what each is & help to choose one that best meets their needs
    - Medicare supplements – what these are & help to choose one that best meets their needs
    - Long Term Care Insurance – what it is & how to choose a policy
    - Medicare Advantage Plans – what these are & help to choose one that best meets their needs
    - Medicare Fraud – How to spot and what to do about it
    - Extra Help/LIS/NCRX programs – explain each and help to apply if needed
    - Help to understand bills, letters and other correspondence from Medicare and/or medical bills
  - Participate in Outreach events for SHIIP
  - Prepare necessary reports
  - Spend a minimum of 40 hours each year working in the SHIIP program

(CONTINUED)

## ACTIVITY JUSTIFICATION

Activity: Seniors' Health Insurance Information Program (SHIIP)	Number of Employees 0.48	# of Full-time <u>0.48</u> # of Part-Time _____	Annual Cost: \$18,226+ inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$18,226		Federal/State Cost:

Each Employee, Job Title, Duties/Responsibilities of Positions in the Activity: *(continued)*

Senior Services Director (3% of position)

- General supervisory, budgetary & oversight duties
- Serve as a SHIIP counselor
  - Complete initial 24 hour training program & attend quarterly training mtgs. thereafter
  - Counsel Medicare recipients & those who will soon be on Medicare by helping with any of the following:
    - Medicare parts A, B & D – what each is & help to choose one that best meets their needs
    - Extra Help/LIS/NCRX programs – explain each and help to apply if needed
    - Help to understand bills, letters and other correspondence from Medicare and/or medical bills
  - Participate in Outreach events for SHIIP
  - Prepare necessary reports
  - Spend a minimum of 40 hours each year working in the SHIIP program
- Conduct “Welcome to Medicare” events at least twice each year to educate those who will soon be on Medicare about the basics of Medicare and explain each part of Medicare
- Assist Coordinator with planning SHIIP outreach events
- Prepare various mass mailings, etc. to comply with SHIIP grant
- Write SHIIP grant each year and complete all necessary paperwork and reports associated with grant

Volunteer Counselors – 3 active – In the first half of FY 13/14 volunteers have logged 152 hours in this area

- Serve as a SHIIP counselor
  - Complete initial 24 hour training program & attend quarterly training meetings thereafter
  - Counsel Medicare recipients and those who will soon be on Medicare by helping with the following as needed:
    - Medicare parts A, B & D – what each is & help to choose one that best meets their needs
    - Medicare supplements – what these are & help to choose one that best meets their needs
    - Long Term Care Insurance – what it is & how to choose a policy
    - Medicare Advantage Plans – what these are & help to choose one that best meets their needs
    - Medicare Fraud – How to spot and what to do about it
    - Extra Help/LIS/NCRX programs – explain each and help to apply if needed
    - Help to understand bills, letters and other correspondence from Medicare and/or medical bills
  - Participate in Outreach events for SHIIP
  - Prepare necessary reports
  - Spend a minimum of 40 hours each year working in the SHIIP program

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Division \_\_\_\_\_

**ACTIVITY JUSTIFICATION**

Activity: Seniors' Health Insurance Information Program (SHIIP)	Number of Employees 0.48	# of Full-time <u>0.48</u> # of Part-Time _____	Annual Cost:  \$18,226+ inkind volunteer time
Mandated by GS - NCGS # _____	County Cost: \$18,226		Federal/State Cost:

Justify Need for Each Position in Detail (use additional pages if necessary):

Insurance Counseling services is a service required to have "on site" in order to obtain/retain certification as a NC Senior Center of Excellence". Having this certification means an increase in General Purpose funding (an increase of \$7,787 in 2013/2014).

<u>Fiscal Year</u>	<u># Unduplicated Clients Served In SHIIP Program</u>
2010 - 2011	114
2011 - 2012	274
2012 - 2013	206
July - Dec. 2013	123

- A coordinator is required to oversee all aspects of the SHIIP program and ensure that clients get the service they need. Having a coordinator that is also counseling clients is vital to ensure that she remains up-to-date and current in her skills and helps to reduce client wait time.
- Having two trained counselors on staff helps reduce client wait time, especially during the Part D enrollment season.
- Demand greatly increased from 10/11 to 11/12 and has stayed rather steady since then. However, many of the cases are becoming more complex, requiring more time per client. In addition, grant funding has decreased, meaning also in this program we must "do more with less". Being able to increase the coordinator's time that she can spend on this program would help immensely. Instead of spending all of her SHIIP time counseling clients, the increase would allow her to be more involved in the planning of SHIIP events and devote more time to assisting the counselors, promoting the SHIIP program, etc., which are critical areas of her role as SHIIP Coordinator.

DAVIE COUNTY  
ANNUAL BUDGET ESTIMATE - SUMMARY OPERATIONAL EXPENSE REQUEST

F.Y. 2014 - 2015Page 1 of 1Department: Senior Services - SHIIP

Account No.	Item	Remarks	Requested		Recommended	
			Local Cost	Non-Local Cost	Local Cost	Non-Local Cost
55210 530120	Postage	14.6% - (Outreach mailing as required by SHIIP grant - \$772 - pd for with SHIIP grant & 4.5% of newsletter - \$153)	\$153	772		
55210 530250	Printing & Binding	14.8% - (Outreach mailing as required by SHIIP grant - \$772 - pd for with SHIIP grant & 4.5% of newsletter - \$270)	\$270	772		
55210 530320	Office Supplies	3% - Various SHIIP handouts	135			
55210 540100	Education & Training	25% - required conference for SHIIP coordinator - pd. for with SHIIP grant		150		
55210 540110	Telephone	10.4% - Aircard for use at client's homes or presentations - pd for with SHIIP grant		456		
55210 550160	Equip. Mtn	1.7% - (3% of Copier Mtn agreement)	78			
55210 560120	Special Events	1% - SHIIP events	600			
55210 560260	Advertising	68% - Various advertising efforts to recruit SHIIP volunteers & clients - pd. For with SHIIP grant		636		
<b>Totals</b>			1236	2786		



**Budget Sheet #5**

**DAVIE COUNTY, NORTH CAROLINA**

F.Y. 2014 - 2015

Department Senior Services

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**CAPITAL OUTLAY DETAIL**

Name of Project or Equipment:

PC Replacement

Description:

Replacement PCs per Schedule

Justification:

Scheduled PC Replacement Program

Estimated Cost:

Replacement PCs – 10 x \$1,250.00 = \$12,500.00

Estimated Annual Operation/Maintenance Cost:

Gold Tech support with complete Care Accidental Damage for 5 years included with purchase price of PC.

**Budget Sheet #6**

**DAVIE COUNTY, NORTH CAROLINA**

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**CONFERENCE & TRAINING DETAIL**

No. Attending:	Purpose, Estimated Date & Location:	Mode of Travel:	Estimated Cost:	Estimated Cost:			Total
				Travel	Fees	Lodge	
1	Senior Center Mgr.'s Training – Purpose - to enhance skills to plan better events, etc.; Date & location TBA. (1 in the Fall and 1 in the Spring) <b>Fulfills requirements for job specific training for Program Coord. \$347 will be paid with General Purpose Grant. The other \$253 will be pd for with revenues earned)</b>	Van or car	\$600.00	0	\$115.00 each module	\$185.00 each module	\$600.00
1	SHIIP Coordinator's conference – To fulfill requirements of SHIIP Coordinator's duties – Date - usually July Location TBA <b>Will fulfill job specific training for Morning Receptionist Pd with SHIIP grant –</b>	Van or Car	\$150.00	0	\$50.00	\$100.00	\$150.00
1	NC Senior Center Leadership Symposium Purpose – To keep abreast of new senior center topics; Date – August, 2013 Location – Asheville NC Senior Center; Alliance presents conference. As Chair, Director is expected to attend & would fulfill her tng requirements – Pd. with General Purpose grant	Van or Car	\$250.00	0	\$85.00	\$165.00	\$250.00

**CONFERENCE & TRAINING DETAIL**

No. Attending:	Purpose, Estimated Date & Location:	Mode of Travel:	Estimated Cost:	Estimated Cost:			Total
				Travel	Fees	Lodge	
1	Various low cost training opportunities relevant to Resource Specialist - Fulfills the hours required by I, A & OC standards and also fulfills job specific training requirements for Resource Specialist. Paid by Block Grant	Van or Car	\$275.00	0	150.00	125.00	275.00
2	Various low cost training opportunities that are relevant to our Adm. Asst & Receptionist- Fulfills both of their job specific training requirements. Pd with General Purpose Grant	Van or Car	\$350.00	0	350.00	0	\$350.00
1	Various low cost seminars regarding Trip Planning or Scrapbooking – Date & Time TBS. This will fulfill Sr. Ctr. Aide’s job specific training requirements. Pd with revenues earned.	Van or Car	\$25.00	0	25.00	0	\$25.00

**CONFERENCE & TRAINING DETAIL**

No. Attending:	Purpose, Estimated Date & Location:	Mode of Travel:	Estimated Cost:	Estimated Cost:			Total
				Travel	Fees	Lodge	
1	NCAOA conference - Purpose - The Nutrition Prog. Coord. will attend this annual conference which combines general & specific training on aging issues Date -- April, 2014 Location -- TBA This will fulfill Nutrition Prog. Coord.'s Job Specific training requirements. \$300 will be paid for by Block Grant. Remaining \$175 pd with revenues earned	Van or Car	\$475.00	0	200.00	275.00	\$475.00
10	Educational classes concerning various Topics on Aging - Date -- Throughout year All staff will attend relevant seminars offered at Senior Services. This will fulfill requirements for Topics on Aging training. Classes will be offered at no cost by Senior Services.	On-site	0	0	0	0	0

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Division \_\_\_\_\_

## SPECIAL WORK PROJECT

Location:  
Senior Services

### Description:

Additions to current building totaling approximately 2875 square feet and the addition of a covered drop off area and an airlock area at the front door to prevent cold air from entering the lobby each time the doors open. Additions would increase the size of the Exercise classroom and the Exercise equipment room, and would provide an additional classroom space that would have the capability of being divided into two separate classrooms or opened into one larger classroom. The covered drop off area would be an area in the front of the door to allow patrons, particularly those who ride the van system, to be unload near the ramp while being protected by the weather.

### Justification:

We are at capacity in our fitness classes and often in the exercise equipment room. Our congregate program has grown tremendously and several days we are at capacity in that room. Our frailer patrons who use walkers and wheelchairs are forced to unload from vehicles or the van service in the rain without any type of protection from the weather. This first phase of expansion will allow us to meet our current needs and then begin the expansion process to meet our needs in the future. Although we have one of the newest buildings in the county, the population we serve is the fastest growing population. In addition, our participation continues to increase year after year. These are the areas seeing the most growth, but there are still other needs as well. Starting this first phase of expansion immediately will provide visibility to allow us to begin a successful capital campaign for the second phase of expansion. We would also propose to use \$50,000 this year to offset costs for Phase 1.

### Statistics:

Last fiscal year our congregate meal program increased by 15.6%.

Our fitness room saw 461 more visits than the year before. Our fitness classes saw 1,682 more visits than the year before.

We have increased our mailing list to new 55 year olds by 500 each year for the past two years.

In the next 20 years it is projected that the county's population of those 60 will make up 32.3% of our population, up from 24.3% in 2012.

In the same 20 years it is projected that the county's population of those under 18 will make up only 21.1% of the population, down from 22.4% in 2012.

This increase in older adults will continue to put demands on our programs and services, and we must start now to meet the needs.

Estimated Cost: \$800,000

We would propose to spend \$50,000 of our donation money that will be carried over to offset some of that cost, bringing the amount requested down to \$750,000.00.

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

			<b>PRIOR YR ACT</b>	<b>CURR ACTUAL</b>	<b>REVISED BUDGET</b>	<b>REQUESTED</b>	<b>MANAGER</b>	<b>BOARD</b>
			<b>JUNE 2013</b>	<b>2013-2014</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>2014-2015</b>	<b>2014-2015</b>
<b>SENIOR CENTER</b>								
45210	430131	USDA FUNDS	(1,000.00)	(519.00)	(1,000.00)	1,500.00		
45210	440039	CLIENT REGISTRATION FEES	(9,491.00)	(7,639.00)	(15,000.00)	12,000.00		
45210	440048	LOCAL FUNDS/INCOME	(12,757.88)	(3,971.75)	(10,000.00)	10,525.00		
45210	480017	MISCELLANEOUS REVENUE	(851.55)	-	-			
45210	480044	DONATIONS	(350,612.03)	(22,589.12)	(12,000.00)	15,000.00		
45210	480068	RURAL HEALTH GRANT	-	-	-			
45210	480069	SHHP GRANT	(4,799.00)	(2,786.00)	(4,800.00)	2,786.00		
45210	480070	WOODSON GRANT	(6,000.00)	-	(7,000.00)	6,000.00		
45210	480071	ENDOWMENT FUND	(5,295.00)	-	(2,400.00)	3,782.00		
45210	490002	BALANCE BWT FORWARD	-	-	(44,314.00)			
<b>TOTAL SENIOR CENTER</b>			<b>(390,806.46)</b>	<b>(37,504.87)</b>	<b>(96,514.00)</b>	<b>51,593.00</b>		
<b>HEALTH &amp; WELLNESS GRANT</b>								
45210201	430126	HEALTH & WELLNESS GRANT	-	-	-			
<b>TOTAL HEALTH &amp; WELLNESS GRANT</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>OUTREACH GRANT</b>								
45210202	430127	OUTREACH GRANT	-	-	-			
<b>TOTAL OUTREACH GRANT</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>LEGAL GRANT</b>								
45210203	430128	LEGAL GRANT	(3,601.00)	(604.00)	(3,844.00)	3,386.00		
45210203	440048	LOCAL FUNDS/INCOME	(625.00)	-	(300.00)	100.00		
<b>TOTAL LEGAL GRANT</b>			<b>(4,226.00)</b>	<b>(604.00)</b>	<b>(4,144.00)</b>	<b>3,486.00</b>		
<b>HOMEBOUND MEAL/INF &amp; CASE AST</b>								
45210204	430129	HOMEBOUND MEALS GRANT	(90,789.00)	(27,878.00)	(93,129.00)	92,373.00		
45210204	430130	INFORMATION & CASE ASST GRANT	(7,705.00)	(2,293.00)	(5,000.00)	6,720.00		
45210204	430131	USDA FUNDS	(15,296.00)	(6,271.00)	(15,180.00)	19,500.00		
45210204	440048	LOCAL FUNDS/INCOME	(7,464.90)	(3,417.00)	(6,800.00)	7,500.00		
45210204	480044	DONATIONS	(6,415.75)	(2,862.50)	(4,200.00)	8,218.00		
45210204	480047	UNITED WAY	(816.77)	(858.00)	(800.00)	1,500.00		
45210204	480065	SALEM PRESBYTERY GRANT	-	-	-			
45210204	480089	DONATION BALLARD	-	-	(168,404.00)			
<b>TOTAL HOMEBOUND MEAL/INF &amp; CASE AST</b>			<b>(128,487.42)</b>	<b>(43,579.50)</b>	<b>(293,513.00)</b>	<b>135,811.00</b>		
<b>CONGREGATE MEALS GRANT</b>								
45210205	430131	USDA FUNDS	(5,619.00)	(2,069.00)	(5,700.00)	6,900.00		
45210205	430132	CONGREGATE MEALS GRANT	(33,407.00)	(7,088.00)	(37,434.00)	29,952.00		
45210205	440048	LOCAL FUNDS/INCOME	(869.60)	(265.40)	(687.00)	600.00		
45210205	480089	DONATION BALLARD	-	-	(168,404.00)			
<b>TOTAL CONGREGATE MEALS GRANT</b>			<b>(39,895.60)</b>	<b>(9,422.40)</b>	<b>(212,225.00)</b>	<b>37,452.00</b>		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

	PRIOR YR ACT JUNE 2013	CURR ACTUAL 2013-2014	REVISED BUDGET 2013-2014	REQUESTED 2014-2015	MANAGER 2014-2015	BOARD 2014-2015
<b>GENERAL PURPOSE STATE FUNDS</b>						
45210206 430133 GENERAL PURPOSE FUNDING	(11,753.00)	-	(11,500.00)			
<b>TOTAL GENERAL PURPOSE STATE FUNDS</b>	<b>(11,753.00)</b>	<b>-</b>	<b>(11,500.00)</b>	<b>11,680.00</b>		
<b>ARTS COUNCIL GRANT</b>						
45210207 430012 ARTS COUNCIL GRANT	-	-	-			
<b>TOTAL ARTS COUNCIL GRANT</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>CARE GIVER GRANT</b>						
45210208 430136 CARE GIVER GRANT	(13,102.00)	(3,623.00)	(15,135.00)	12,802.00		
45210208 480044 DONATIONS	(150.00)	-	(100.00)	100.00		
<b>TOTAL CARE GIVER GRANT</b>	<b>(13,252.00)</b>	<b>(3,623.00)</b>	<b>(15,235.00)</b>	<b>12,902.00</b>		
<b>SENIOR SERVICE OPERATION GT</b>						
45210209 430085 NC DIVISION OF AGING (COG)	-	-	-			
<b>TOTAL SENIOR SERVICE OPERATION GT</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>ENSURE PROGRAM</b>						
45210210 430131 USDA FUNDS	(6,130.00)	(2,889.00)	(5,647.00)	7,050.00		
45210210 440048 LOCAL FUNDS/INCOME	(28.00)	(15.00)	(100.00)	100.00		
45210210 480067 GRANT	(391.00)	(104.00)	(407.00)	407.00		
<b>TOTAL ENSURE PROGRAM</b>	<b>(6,549.00)</b>	<b>(3,008.00)</b>	<b>(6,154.00)</b>	<b>7,557.00</b>		
<b>TOTAL SENIOR SERVICES</b>	<b>(594,969.48)</b>	<b>(97,741.77)</b>	<b>(639,285.00)</b>	<b>260,481.00</b>		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

		<b>PRIOR YR ACT JUNE 2013</b>	<b>CURR ACTUAL 2013-2014</b>	<b>REVISED BUDGET 2013-2014</b>	<b>REQUESTED 2014-2015</b>	<b>MANAGER 2014-2015</b>	<b>BOARD 2014-2015</b>
<b>SENIOR CENTER</b>							
55210	510010 SALARIES AND WAGES	153,820.79	58,158.10	157,239.00	178,698.00		
55210	510020 PART-TIME SALARIES	34,316.40	13,419.51	36,731.00	22,573.00		
55210	510040 LONGEVITY	1,480.00	1,630.00	1,630.00	1,830.00		
55210	520050 FICA	14,115.60	5,461.26	14,569.00	15,345.00		
55210	520060 GROUP HOSPITAL INSURANCE	34,423.96	13,356.08	36,919.00	46,695.00		
55210	520070 RETIREMENT	11,395.03	4,622.12	11,591.00	13,006.00		
55210	520080 WORKMENS COMPENSATION	660.86	-	653.00	653.00		
55210	520100 ECS UNEMPLOYMENT INSURANCE	-	-	-	-		
55210	520110 GROUP LIFE INSURANCE	180.75	71.02	-	-		
55210	520120 401K-EMPLOYER SUPPLEMENT	4,457.26	1,744.71	4,624.00	5,393.00		
55210	520130 YMCA MEMBERSHIP	-	-	-	-		
55210	520250 EMPLOYEE MEDICAL EXPENSE	-	-	-	-		
55210	520260 EMPLOYEE EDUCATION REIMBURSEME	-	-	-	-		
55210	530120 POSTAGE	6,228.06	537.27	4,960.00	6,356.00		
55210	530250 PRINTING & BINDING	10,522.58	-	6,510.00	7,022.00		
55210	530300 VEHICLE TIRES	-	-	300.00	300.00		
55210	530310 VEHICLE GAS & OIL	1,958.09	800.06	2,310.00	2,310.00		
55210	530320 OFFICE SUPPLIES	4,760.75	1,153.07	4,500.00	4,500.00		
55210	530330 DEPARTMENT SUPPLIES	-	-	-	-		
55210	540100 EDUCATION & TRAINING	232.03	148.07	590.00	603.00		
55210	540110 TELEPHONE	3,910.28	1,455.78	4,260.00	4,368.00		
55210	540130 UTILITIES	-	-	-	-		
55210	540140 TRAVEL	165.69	34.92	300.00	300.00		
55210	540210 BUILDING & EQUIPMENT RENTAL	1,430.00	-	-	-		
55210	540450 PURCHASED SERVICES	26,951.94	7,638.44	27,420.00	29,240.00		
55210	540453 PURCHASED SERVICES WOODSON	7,000.00	-	7,000.00	6,000.00		
55210	541540 COMPUTER SERVICES	-	2,181.25	3,835.00	3,120.00		
55210	541550 CONSULTANTS	-	-	-	-		
55210	550150 BUILDING & GROUNDS MAINTENANCE	-	-	2,500.00	2,500.00		
55210	550160 EQUIPMENT MAINTENANCE	4,359.18	4,634.38	5,000.00	4,600.00		
55210	560120 SPECIAL EVENTS	32,675.39	17,441.50	51,585.00	50,100.00		
55210	560121 SPECIAL EVENTS-DONATIONS	1,508.58	157.92	11,000.00	15,000.00		
55210	560122 SPEC EV DONATIONS BWT FORWARD	-	-	44,314.00	-		
55210	560260 ADVERTISING	1,243.00	221.30	1,300.00	936.00		
55210	560530 DUES & SUBSCRIPTIONS	815.28	566.16	745.00	782.00		
55210	560540 INSURANCE & BONDS	-	-	-	-		
55210	560570 MISCELLANEOUS	-	-	-	-		
55210	560600 BUILDING INSURANCE	-	-	-	-		
55210	580600 EQUIPMENT & FURNITURE	8,087.47	-	794.00	1,470.00		
55210	580620 COMPUTER HARDWARE	-	-	1,500.00	12,500.00		
55210	580640 BUILDING IMPROVEMENTS	-	-	-	800,000.00		
<b>TOTAL SENIOR CENTER</b>		<b>366,698.97</b>	<b>135,432.92</b>	<b>444,679.00</b>	<b>1,236,200.00</b>		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

		<b>PRIOR YR ACT</b>	<b>CURR ACTUAL</b>	<b>REVISED BUDGET</b>	<b>REQUESTED</b>	<b>MANAGER</b>	<b>BOARD</b>
		<b>JUNE 2013</b>	<b>2013-2014</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>2014-2015</b>	<b>2014-2015</b>
<b>HEALTH &amp; WELLNESS GRANT</b>							
55210201	510010	SALARIES AND WAGES	-	-	-		
55210201	510020	PART-TIME SALARIES	-	-	-		
55210201	510040	LONGEVITY	-	-	-		
55210201	520050	FICA	-	-	-		
55210201	520060	GROUP HOSPITAL INSURANCE	-	-	-		
55210201	520070	RETIREMENT	-	-	-		
55210201	520080	WORKMENS COMPENSATION	-	-	-		
55210201	520100	ECS UNEMPLOYMENT INSURANCE	-	-	-		
55210201	520110	GROUP LIFE INSURANCE	-	-	-		
55210201	520120	401K-EMPLOYER SUPPLEMENT	-	-	-		
55210201	520130	YMCA MEMBERSHIP	-	-	-		
55210201	520250	EMPLOYEE MEDICAL EXPENSE	-	-	-		
55210201	520260	EMPLOYEE EDUCATION REIMBURSEME	-	-	-		
55210201	530120	POSTAGE	-	-	-		
55210201	530250	PRINTING & BINDING	-	-	-		
55210201	530300	VEHICLE TIRES	-	-	-		
55210201	530310	VEHICLE GAS & OIL	-	-	-		
55210201	530320	OFFICE SUPPLIES	-	-	-		
55210201	530330	DEPARTMENT SUPPLIES	-	-	-		
55210201	540100	EDUCATION & TRAINING	-	-	-		
55210201	540110	TELEPHONE	-	-	-		
55210201	540130	UTILITIES	-	-	-		
55210201	540140	TRAVEL	-	-	-		
55210201	540210	BUILDING & EQUIPMENT RENTAL	-	-	-		
55210201	540450	PURCHASED SERVICES	-	-	-		
55210201	541540	COMPUTER SERVICES	-	-	-		
55210201	541550	CONSULTANTS	-	-	-		
55210201	550150	BUILDING & GROUNDS MAINTENANCE	-	-	-		
55210201	550160	EQUIPMENT MAINTENANCE	-	-	-		
55210201	560120	SPECIAL EVENTS	-	-	-		
55210201	560260	ADVERTISING	-	-	-		
55210201	560530	DUES & SUBSCRIPTIONS	-	-	-		
55210201	560540	INSURANCE & BONDS	-	-	-		
55210201	560570	MISCELLANEOUS	-	-	-		
55210201	560600	BUILDING INSURANCE	-	-	-		
55210201	580600	EQUIPMENT & FURNITURE	-	-	-		
55210201	580620	COMPUTER HARDWARE	-	-	-		
55210201	580640	BUILDING IMPROVEMENTS	-	-	-		
<b>TOTAL HEALTH &amp; WELLNESS GRANT</b>			-	-	-		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

	PRIOR YR ACT JUNE 2013	CURR ACTUAL 2013-2014	REVISED BUDGET 2013-2014	REQUESTED 2014-2015	MANAGER 2014-2015	BOARD 2014-2015
<b>OUTREACH GRANT</b>						
55210202 510010 SALARIES AND WAGES	-	-	-			
55210202 510020 PART-TIME SALARIES	-	-	-			
55210202 510040 LONGEVITY	-	-	-			
55210202 520050 FICA	-	-	-			
55210202 520060 GROUP HOSPITAL INSURANCE	-	-	-			
55210202 520070 RETIREMENT	-	-	-			
55210202 520080 WORKMENS COMPENSATION	-	-	-			
55210202 520100 ECS UNEMPLOYMENT INSURANCE	-	-	-			
55210202 520110 GROUP LIFE INSURANCE	-	-	-			
55210202 520120 401K-EMPLOYER SUPPLEMENT	-	-	-			
55210202 520130 YMCA MEMBERSHIP	-	-	-			
55210202 520250 EMPLOYEE MEDICAL EXPENSE	-	-	-			
55210202 520260 EMPLOYEE EDUCATION REIMBURSEME	-	-	-			
55210202 530120 POSTAGE	-	-	-			
55210202 530250 PRINTING & BINDING	-	-	-			
55210202 530300 VEHICLE TIRES	-	-	-			
55210202 530310 VEHICLE GAS & OIL	-	-	-			
55210202 530320 OFFICE SUPPLIES	-	-	-			
55210202 530330 DEPARTMENT SUPPLIES	-	-	-			
55210202 540100 EDUCATION & TRAINING	-	-	-			
55210202 540110 TELEPHONE	-	-	-			
55210202 540130 UTILITIES	-	-	-			
55210202 540140 TRAVEL	-	-	-			
55210202 540210 BUILDING & EQUIPMENT RENTAL	-	-	-			
55210202 540450 PURCHASED SERVICES	-	-	-			
55210202 541540 COMPUTER SERVICES	-	-	-			
55210202 541550 CONSULTANTS	-	-	-			
55210202 550150 BUILDING & GROUNDS MAINTENANCE	-	-	-			
55210202 550160 EQUIPMENT MAINTENANCE	-	-	-			
55210202 560120 SPECIAL EVENTS	-	-	-			
55210202 560260 ADVERTISING	-	-	-			
55210202 560530 DUES & SUBSCRIPTIONS	-	-	-			
55210202 560540 INSURANCE & BONDS	-	-	-			
55210202 560570 MISCELLANEOUS	-	-	-			
55210202 560600 BUILDING INSURANCE	-	-	-			
55210202 580600 EQUIPMENT & FURNITURE	-	-	-			
55210202 580620 COMPUTER HARDWARE	-	-	-			
55210202 580640 BUILDING IMPROVEMENTS	-	-	-			
<b>TOTAL OUTREACH GRANT</b>	-	-	-			

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

	PRIOR YR ACT JUNE 2013	CURR ACTUAL 2013-2014	REVISED BUDGET 2013-2014	REQUESTED 2014-2015	MANAGER 2014-2015	BOARD 2014-2015
<b>LEGAL GRANT</b>						
55210203 510010 SALARIES AND WAGES	-	-	-			
55210203 510020 PART-TIME SALARIES	-	-	-			
55210203 510040 LONGEVITY	-	-	-			
55210203 520050 FICA	-	-	-			
55210203 520060 GROUP HOSPITAL INSURANCE	-	-	-			
55210203 520070 RETIREMENT	-	-	-			
55210203 520080 WORKMENS COMPENSATION	-	-	-			
55210203 520100 ECS UNEMPLOYMENT INSURANCE	-	-	-			
55210203 520110 GROUP LIFE INSURANCE	-	-	-			
55210203 520120 401K-EMPLOYER SUPPLEMENT	-	-	-			
55210203 520130 YMCA MEMBERSHIP	-	-	-			
55210203 520250 EMPLOYEE MEDICAL EXPENSE	-	-	-			
55210203 520260 EMPLOYEE EDUCATION REIMBURSEME	-	-	-			
55210203 530120 POSTAGE	-	-	-			
55210203 530250 PRINTING & BINDING	-	-	-			
55210203 530300 VEHICLE TIRES	-	-	-			
55210203 530310 VEHICLE GAS & OIL	-	-	-			
55210203 530320 OFFICE SUPPLIES	-	-	-			
55210203 530330 DEPARTMENT SUPPLIES	-	-	-			
55210203 540100 EDUCATION & TRAINING	-	-	-			
55210203 540110 TELEPHONE	-	-	-			
55210203 540130 UTILITIES	-	-	-			
55210203 540140 TRAVEL	-	-	-			
55210203 540210 BUILDING & EQUIPMENT RENTAL	-	-	-			
55210203 540450 PURCHASED SERVICES	4,449.00	640.00	4,144.00	3,486.00		
55210203 541540 COMPUTER SERVICES	-	-	-			
55210203 541550 CONSULTANTS	-	-	-			
55210203 550150 BUILDING & GROUNDS MAINTENANCE	-	-	-			
55210203 550160 EQUIPMENT MAINTENANCE	-	-	-			
55210203 560120 SPECIAL EVENTS	-	-	-			
55210203 560260 ADVERTISING	-	-	-			
55210203 560530 DUES & SUBSCRIPTIONS	-	-	-			
55210203 560540 INSURANCE & BONDS	-	-	-			
55210203 560570 MISCELLANEOUS	-	-	-			
55210203 560600 BUILDING INSURANCE	-	-	-			
55210203 580600 EQUIPMENT & FURNITURE	-	-	-			
55210203 580620 COMPUTER HARDWARE	-	-	-			
55210203 580640 BUILDING IMPROVEMENTS	-	-	-			
<b>TOTAL LEGAL GRANT</b>	<b>4,449.00</b>	<b>640.00</b>	<b>4,144.00</b>	<b>3,486.00</b>		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

	<b>PRIOR YR ACT JUNE 2013</b>	<b>CURR ACTUAL 2013-2014</b>	<b>REVISED BUDGET 2013-2014</b>	<b>REQUESTED 2014-2015</b>	<b>MANAGER 2014-2015</b>	<b>BOARD 2014-2015</b>
<b>HOMEBOUND MEAL/INF &amp; CASE AST</b>						
55210204 510010 SALARIES AND WAGES	11,177.00	5,993.00	7,255.00	10,178.00		
55210204 510020 PART-TIME SALARIES	-	-	-			
55210204 510040 LONGEVITY	-	-	-			
55210204 520050 FICA	855.06	449.42	556.00	817.00		
55210204 520060 GROUP HOSPITAL INSURANCE	2,606.71	1,361.95	2,189.00	3,565.00		
55210204 520070 RETIREMENT	753.34	423.70	357.00	526.00		
55210204 520080 WORKMENS COMPENSATION	37.75	-	39.00	95.00		
55210204 520100 ECS UNEMPLOYMENT INSURANCE	-	-	-			
55210204 520110 GROUP LIFE INSURANCE	13.19	6.85	-			
55210204 520120 401K-EMPLOYER SUPPLEMENT	335.32	179.81	217.00	312.00		
55210204 520130 YMCA MEMBERSHIP	-	-	-			
55210204 520250 EMPLOYEE MEDICAL EXPENSE	-	-	-			
55210204 520260 EMPLOYEE EDUCATION REIMBURSEME	-	-	-			
55210204 530120 POSTAGE	-	-	-			
55210204 530250 PRINTING & BINDING	-	-	-			
55210204 530300 VEHICLE TIRES	-	-	-			
55210204 530310 VEHICLE GAS & OIL	-	-	-			
55210204 530320 OFFICE SUPPLIES	-	-	-			
55210204 530330 DEPARTMENT SUPPLIES	-	-	-			
55210204 540100 EDUCATION & TRAINING	265.00	-	275.00	275.00		
55210204 540110 TELEPHONE	-	-	-			
55210204 540130 UTILITIES	-	-	-			
55210204 540140 TRAVEL	27,634.40	9,954.05	26,600.00	28,000.00		
55210204 540210 BUILDING & EQUIPMENT RENTAL	-	-	-			
55210204 540450 PURCHASED SERVICES	85,723.10	29,402.57	87,600.00	92,043.00		
55210204 541540 COMPUTER SERVICES	-	-	-			
55210204 541550 CONSULTANTS	-	-	-			
55210204 550150 BUILDING & GROUNDS MAINTENANCE	-	-	-			
55210204 550160 EQUIPMENT MAINTENANCE	-	-	-			
55210204 560120 SPECIAL EVENTS	-	-	-			
55210204 560122 SPEC EV DONATIONS BWT FORWARD	-	-	168,404.00			
55210204 560260 ADVERTISING	-	-	-			
55210204 560530 DUES & SUBSCRIPTIONS	-	-	-			
55210204 560540 INSURANCE & BONDS	-	-	-			
55210204 560570 MISCELLANEOUS	-	-	-			
55210204 560600 BUILDING INSURANCE	-	-	-			
55210204 580600 EQUIPMENT & FURNITURE	-	-	-			
55210204 580620 COMPUTER HARDWARE	-	-	-			
55210204 580640 BUILDING IMPROVEMENTS	-	-	-			
<b>TOTAL HOMEBOUND MEAL/INF &amp; CASE AST</b>	<b>129,400.87</b>	<b>47,771.35</b>	<b>293,492.00</b>	<b>135,811.00</b>		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

	PRIOR YR ACT JUNE 2013	CURR ACTUAL 2013-2014	REVISED BUDGET 2013-2014	REQUESTED 2014-2015	MANAGER 2014-2015	BOARD 2014-2015
<b>CONGREGATE MEALS GRANT</b>						
55210205 510010 SALARIES AND WAGES	5,391.00	1,466.00	5,390.00	1,474.00		
55210205 510020 PART-TIME SALARIES	-	-	-			
55210205 510040 LONGEVITY	-	-	-			
55210205 520050 FICA	402.39	109.42	412.00	113.00		
55210205 520060 GROUP HOSPITAL INSURANCE	1,194.77	330.59	1,425.00			
55210205 520070 RETIREMENT	363.36	103.64	266.00			
55210205 520080 WORKMENS COMPENSATION	17.96	-	19.00			
55210205 520100 ECS UNEMPLOYMENT INSURANCE	-	-	-			
55210205 520110 GROUP LIFE INSURANCE	6.11	1.66	-			
55210205 520120 401K-EMPLOYER SUPPLEMENT	161.74	43.98	163.00			
55210205 520130 YMCA MEMBERSHIP	-	-	-			
55210205 520250 EMPLOYEE MEDICAL EXPENSE	-	-	-			
55210205 520260 EMPLOYEE EDUCATION REIMBURSEME	-	-	-			
55210205 530120 POSTAGE	-	-	-			
55210205 530250 PRINTING & BINDING	-	-	-			
55210205 530300 VEHICLE TIRES	-	-	-			
55210205 530310 VEHICLE GAS & OIL	-	-	-			
55210205 530320 OFFICE SUPPLIES	1,430.47	687.21	1,600.00	2,000.00		
55210205 530330 DEPARTMENT SUPPLIES	-	-	-			
55210205 540100 EDUCATION & TRAINING	250.00	-	250.00	300.00		
55210205 540110 TELEPHONE	-	-	-			
55210205 540130 UTILITIES	-	-	-			
55210205 540140 TRAVEL	-	-	-			
55210205 540210 BUILDING & EQUIPMENT RENTAL	-	-	-			
55210205 540450 PURCHASED SERVICES	28,470.00	10,844.49	34,280.00	33,565.00		
55210205 541540 COMPUTER SERVICES	-	-	-			
55210205 541550 CONSULTANTS	-	-	-			
55210205 550150 BUILDING & GROUNDS MAINTENANCE	-	-	-			
55210205 550160 EQUIPMENT MAINTENANCE	-	-	-			
55210205 560120 SPECIAL EVENTS	-	-	-			
55210205 560122 SPEC EV DONATIONS BWT FORWARD	-	-	168,404.00			
55210205 560260 ADVERTISING	-	-	-			
55210205 560530 DUES & SUBSCRIPTIONS	-	-	-			
55210205 560540 INSURANCE & BONDS	-	-	-			
55210205 560570 MISCELLANEOUS	-	-	-			
55210205 560600 BUILDING INSURANCE	-	-	-			
55210205 580600 EQUIPMENT & FURNITURE	-	-	-			
55210205 580620 COMPUTER HARDWARE	-	-	-			
55210205 580640 BUILDING IMPROVEMENTS	-	-	-			
<b>TOTAL CONGREGATE MEALS GRANT</b>	<b>37,687.80</b>	<b>13,586.99</b>	<b>212,209.00</b>	<b>37,452.00</b>		

**COUNTY OF DAVIE  
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	<b>PRIOR YR ACT JUNE 2013</b>	<b>CURR ACTUAL 2013-2014</b>	<b>REVISED BUDGET 2013-2014</b>	<b>REQUESTED 2014-2015</b>	<b>MANAGER 2014-2015</b>	<b>BOARD 2014-2015</b>
<b>GENERAL PURPOSE STATE FUNDS</b>						
55210206 510010 SALARIES AND WAGES	-	-	-			
55210206 510020 PART-TIME SALARIES	-	-	-			
55210206 510040 LONGEVITY	-	-	-			
55210206 520050 FICA	-	-	-			
55210206 520060 GROUP HOSPITAL INSURANCE	-	-	-			
55210206 520070 RETIREMENT	-	-	-			
55210206 520080 WORKMENS COMPENSATION	-	-	-			
55210206 520100 ECS UNEMPLOYMENT INSURANCE	-	-	-			
55210206 520110 GROUP LIFE INSURANCE	-	-	-			
55210206 520120 401K-EMPLOYER SUPPLEMENT	-	-	-			
55210206 520130 YMCA MEMBERSHIP	-	-	-			
55210206 520250 EMPLOYEE MEDICAL EXPENSE	-	-	-			
55210206 520260 EMPLOYEE EDUCATION REIMBURSEME	-	-	-			
55210206 530120 POSTAGE	2,991.00	3,334.32	5,400.00	5,233.00		
55210206 530250 PRINTING & BINDING	-	2,465.00	5,100.00	5,500.00		
55210206 530300 VEHICLE TIRES	-	-	-			
55210206 530310 VEHICLE GAS & OIL	-	-	-			
55210206 530320 OFFICE SUPPLIES	-	-	-			
55210206 530330 DEPARTMENT SUPPLIES	-	-	-			
55210206 540100 EDUCATION & TRAINING	1,493.97	577.30	1,000.00	947.00		
55210206 540110 TELEPHONE	-	-	-			
55210206 540130 UTILITIES	-	-	-			
55210206 540140 TRAVEL	-	-	-			
55210206 540210 BUILDING & EQUIPMENT RENTAL	-	-	-			
55210206 540450 PURCHASED SERVICES	-	-	-			
55210206 541540 COMPUTER SERVICES	-	-	-			
55210206 541550 CONSULTANTS	-	-	-			
55210206 550150 BUILDING & GROUNDS MAINTENANCE	-	-	-			
55210206 550160 EQUIPMENT MAINTENANCE	-	-	-			
55210206 560120 SPECIAL EVENTS	6,989.35	-	-			
55210206 560260 ADVERTISING	-	-	-			
55210206 560530 DUES & SUBSCRIPTIONS	-	-	-			
55210206 560540 INSURANCE & BONDS	-	-	-			
55210206 560570 MISCELLANEOUS	-	-	-			
55210206 560600 BUILDING INSURANCE	-	-	-			
55210206 580600 EQUIPMENT & FURNITURE	-	-	-			
55210206 580620 COMPUTER HARDWARE	-	-	-			
55210206 580640 BUILDING IMPROVEMENTS	-	-	-			
<b>TOTAL GENERAL PURPOSE STATE FUNDS</b>	<b>11,474.32</b>	<b>6,376.62</b>	<b>11,500.00</b>	<b>11,680.00</b>		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

	<b>PRIOR YR ACT</b>	<b>CURR ACTUAL</b>	<b>REVISED BUDGET</b>	<b>REQUESTED</b>	<b>MANAGER</b>	<b>BOARD</b>
	<b>JUNE 2013</b>	<b>2013-2014</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>2014-2015</b>	<b>2014-2015</b>
<b>ARTS COUNCIL GRANT</b>						
55210207 510010 SALARIES AND WAGES	-	-	-	-		
55210207 510020 PART-TIME SALARIES	-	-	-	-		
55210207 510040 LONGEVITY	-	-	-	-		
55210207 520050 FICA	-	-	-	-		
55210207 520060 GROUP HOSPITAL INSURANCE	-	-	-	-		
55210207 520070 RETIREMENT	-	-	-	-		
55210207 520080 WORKMENS COMPENSATION	-	-	-	-		
55210207 520100 ECS UNEMPLOYMENT INSURANCE	-	-	-	-		
55210207 520110 GROUP LIFE INSURANCE	-	-	-	-		
55210207 520120 401K-EMPLOYER SUPPLEMENT	-	-	-	-		
55210207 520130 YMCA MEMBERSHIP	-	-	-	-		
55210207 520250 EMPLOYEE MEDICAL EXPENSE	-	-	-	-		
55210207 520260 EMPLOYEE EDUCATION REIMBURSEME	-	-	-	-		
55210207 530120 POSTAGE	-	-	-	-		
55210207 530250 PRINTING & BINDING	-	-	-	-		
55210207 530300 VEHICLE TIRES	-	-	-	-		
55210207 530310 VEHICLE GAS & OIL	-	-	-	-		
55210207 530320 OFFICE SUPPLIES	-	-	-	-		
55210207 530330 DEPARTMENT SUPPLIES	-	-	-	-		
55210207 540100 EDUCATION & TRAINING	-	-	-	-		
55210207 540110 TELEPHONE	-	-	-	-		
55210207 540130 UTILITIES	-	-	-	-		
55210207 540140 TRAVEL	-	-	-	-		
55210207 540210 BUILDING & EQUIPMENT RENTAL	-	-	-	-		
55210207 540450 PURCHASED SERVICES	-	-	-	-		
55210207 541540 COMPUTER SERVICES	-	-	-	-		
55210207 541550 CONSULTANTS	-	-	-	-		
55210207 550150 BUILDING & GROUNDS MAINTENANCE	-	-	-	-		
55210207 550160 EQUIPMENT MAINTENANCE	-	-	-	-		
55210207 560120 SPECIAL EVENTS	-	-	-	-		
55210207 560260 ADVERTISING	-	-	-	-		
55210207 560530 DUES & SUBSCRIPTIONS	-	-	-	-		
55210207 560540 INSURANCE & BONDS	-	-	-	-		
55210207 560570 MISCELLANEOUS	-	-	-	-		
55210207 560600 BUILDING INSURANCE	-	-	-	-		
55210207 580600 EQUIPMENT & FURNITURE	-	-	-	-		
55210207 580620 COMPUTER HARDWARE	-	-	-	-		
55210207 580640 BUILDING IMPROVEMENTS	-	-	-	-		
<b>TOTAL ARTS COUNCIL GRANT</b>	-	-	-	-		

**COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR**

	<b>PRIOR YR ACT JUNE 2013</b>	<b>CURR ACTUAL 2013-2014</b>	<b>REVISED BUDGET 2013-2014</b>	<b>REQUESTED 2014-2015</b>	<b>MANAGER 2014-2015</b>	<b>BOARD 2014-2015</b>
<b>CARE GIVER GRANT</b>						
55210208 530250 PRINTING & BINDING	-	-	-			
55210208 530330 DEPARTMENT SUPPLIES	-	-	-			
55210208 540100 EDUCATION & TRAINING	-	-	-			
55210208 540450 PURCHASED SERVICES	15,084.00	4,558.13	15,235.00	12,902.00		
55210208 560260 ADVERTISING	-	-	-			
55210208 580620 COMPUTER HARDWARE	-	-	-			
<b>TOTAL CARE GIVER GRANT</b>	<b>15,084.00</b>	<b>4,558.13</b>	<b>15,235.00</b>	<b>12,902.00</b>		
<b>SENIOR SERVICE OPERATION GRANT</b>						
55210209 510020 PART-TIME SALARIES	-	-	-			
55210209 520050 FICA	-	-	-			
55210209 520070 RETIREMENT	-	-	-			
55210209 530120 POSTAGE	-	-	-			
55210209 530250 PRINTING & BINDING	-	-	-			
55210209 530330 DEPARTMENT SUPPLIES	-	-	-			
55210209 540100 EDUCATION & TRAINING	-	-	-			
55210209 540130 UTILITIES	-	-	-			
55210209 540450 PURCHASED SERVICES	-	-	-			
55210209 550160 EQUIPMENT MAINTENANCE	-	-	-			
55210209 560120 SPECIAL EVENTS	-	-	-			
55210209 560260 ADVERTISING	-	-	-			
55210209 580600 EQUIPMENT & FURNITURE	-	-	-			
55210209 580620 COMPUTER HARDWARE	-	-	-			
<b>TOTAL SENIOR SERVICE OPERATION GRANT</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>ENSURE PROGRAM</b>						
55210210 510010 SALARIES AND WAGES	465.00	4,630.00	2,052.00	3,863.00		
55210210 520050 FICA	35.57	354.21	157.00	308.00		
55210210 520060 GROUP HOSPITAL INSURANCE	105.80	1,087.08	91.00	140.00		
55210210 520070 RETIREMENT	31.34	327.34	101.00	198.00		
55210210 520080 WORKMENS COMPENSATION	1.83	-	2.00			
55210210 520110 GROUP LIFE INSURANCE	0.55	5.47	-			
55210210 520120 401K-EMPLOYER SUPPLEMENT	13.95	138.90	53.00	121.00		
55210210 530330 DEPARTMENT SUPPLIES	2,532.67	1,245.80	3,700.00	2,927.00		
55210210 580620 COMPUTER HARDWARE	-	-	-			
<b>TOTAL ENSURE PROGRAM</b>	<b>3,186.71</b>	<b>7,788.80</b>	<b>6,156.00</b>	<b>7,557.00</b>		
<b>TOTAL SENIOR SERVICES EXPENSES</b>	<b>567,981.67</b>	<b>216,154.81</b>	<b>987,415.00</b>	<b>1,445,088.00</b>		

COUNTY OF DAVIE  
BUDGET 2014-2015 FISCAL YEAR

Org	Emp #	Last Name	First	Job Desc	Service Date	Yrs Srvc		Grade	Hourly	Annual	Request
						Jul 14 - Jun 15					
55210	<u>153</u>	BEAVERS	INA	NUTRITION PROGRAM COORDINATOR	02/20/1991	24		57		36,342.00	36,342.00
55210	<u>940</u>	HUNTER	MITZI	MORNING RECEPTIONIST / SHIIP COORD							23,497.00
55210	<u>970</u>	NORMAN	ELIZABETH	OUTREACH COORDINATOR	06/21/2012	3		58		24,068.00	24,070.00
55210	<u>425</u>	SHUSKEY	KIMBERLY	SENIOR CENTER DIR	07/01/2001	14		69		48,428.00	48,428.00
55210	<u>594</u>	SLOAN	KELLY	COMMUNITY RESOURCE TECHNICIAN	10/01/2004	10		63		34,905.00	35,483.00
55210	<u>32</u>	VEACH	TRACY	ADMIN 2 GA40	09/12/2011	3		60		26,536.00	26,538.00
55210	<u>426</u>	THORNTON	BARBARA	SENIOR CENTER AID					9.14		5,978.00
55210	<u>1048</u>	WALKER	STEPHANIE	SENIOR CENTER AID					8.79		8,227.00
55210	<u>830</u>	MAURICE	BEVERLY	PART TIME SECRETARY					10.50		1,512.00
55210	<u>992</u>	SHEETS	DARLENE	NUTRITION SITE MANAGER					8.79		6,856.00
TOTAL FULL TIME											
TOTAL PART TIME										170,279.00	194,358.00
TOTAL										-	22,573.00
LONGEVITY										170,279.00	216,931.00
											1,830.00
FICA											16,735.00
HOSPITAL											50,400.00
RETIREMENT											13,870.00
401K											5,831.00

TOTAL AUTHORIZED POSITIONS 5 FULL TIME; PART-TIME AS NEEDED.