

# **Lincoln County**

## **Locally Developed, Coordinated Public Transit- Human Service Transportation Plan 2019 - 2023**



*Facilitated By:*

**North Central Wisconsin Regional Planning Commission**

**Lincoln County  
Locally Developed  
Coordinated  
Public Transit-Human Services  
Transportation Plan  
2019-2023**

prepared for:

Lincoln County

and

Wisconsin Department of Transportation

by:

North Central Wisconsin Regional Planning Commission

**August 31, 2018**

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This plan was prepared for Lincoln County at the request and under the direction of the Wisconsin Department of Transportation by the North Central Wisconsin Regional Planning Commission (NCWRPC). For more information, contact:

NORTH CENTRAL WISCONSIN REGIONAL PLANNING COMMISSION  
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## **INTRODUCTION-WHY COORDINATION?**

Transportation is among the most requested support service for seniors and individuals with disabilities. It allows individuals to remain in a community setting and avoid costly institutional care. Access to transportation is vital to meeting basic needs such as errands, nutrition, medical appointments and for other social, family and religious purposes.

Yet, resources and capacity to provide this critical service are limited. In the current fiscal environment of ever increasing budget constraints compounded by levy limits, local governments struggle to provide adequate funding to meet the needs. Coordinated planning provides an opportunity to bring interested parties together to discuss ways to enhance the mobility of seniors and individuals with disabilities such as creating or improving efficiencies through coordination of services. However, one meeting every 5-years is not enough. Local leadership is needed to maintain positive momentum.

Experience shows that one of the most effective tools in promoting and developing coordinated transportation services is an active coordination committee that meets regularly, has an active, comprehensive membership, and is charged with a clear mission. Because coordination requires working with a variety of funding sources and transportation programs to improve service delivery, it is logical that meeting regularly and working together will lead to coordination success. While different models exist, the key characteristics of a successful coordination committee include regular ongoing meetings, commitments from participants, at least one champion for coordination and a clear process for developing an action plan to address unmet needs and service duplications. In Wisconsin, while some existing coordination committees have been less inclusive than others, nearly all have been able to improve some aspect of their local transportation services.

## **OVERVIEW AND PURPOSE**

Federal transit law requires that any projects selected for funding under the Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities (formerly titled Elderly and Disabled Capital Assistance Program) must be derived from a "locally developed, coordinated public transit-human services transportation plan". This requirement was implemented as part of the SAFETEA-LU legislation and the requirement continues under the new transportation legislation, FAST Act (Fixing America's Surface Transportation). The purpose of the coordinated planning process is to have stakeholder involvement in the assessment of elderly and disabled transportation, and to provide strategies and goals to improve those transportation alternatives. These coordinated plans were last completed in 2013 and are due to be updated for 2019.

It is important to note that under previous Federal legislation (see MAP-21), the Job Access and Reverse Commute (JARC/WETAP) and New Freedom programs were repealed and eligible projects may be funded under either the expanded 5310 program (for New Freedom type

projects) or the 5311 program (for JARC/WETAP type projects). Only those projects eligible to be funded under the 5310 program need to be included as part of the coordinated planning process. This would include the “traditional” 5310 vehicle purchase requests, and also the New Freedom-type projects for mobility management or other capital projects, or for operating assistance projects such as volunteer driver programs or voucher programs.

Development of the plan includes gathering demographic information, documenting the existing transportation services for the plan area, holding a public meeting to discuss elderly and disabled transportation services, and development of strategies for improving those services over the next five years. Plans may be developed on an individual county basis, a multi-county basis, or a region-wide basis. The planning process must be complete and the final report must be submitted prior to October 15, 2018 and will be for grant years 2019 - 2023.

### **Federal Requirements**

FTA guidelines require a locally developed, coordinated public transit-human services transportation plan that consists of, at a minimum:

- an assessment that identifies public, private, and non-profit entities that currently provide transportation services to persons with disabilities, older adults, and people with low incomes, and the availability of those services;
- an assessment of transportation needs for persons with disabilities, older adults, and persons with low incomes, and gaps in service; this assessment may be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts;
- strategies activities and/or projects to address the identified gaps between current services and needs, as well as opportunities to improve efficiencies in service delivery; and
- priorities for implementation based on resources, time, and feasibility for implementing specific strategies/activities identified.

Recipients of 5310 funding must certify that projects selected for funding were derived from a coordinated plan, and the plan was developed through a process that included representatives of public, private, and non-profit transportation and human services providers, and members of the public, including persons with disabilities, elderly, low-income individuals and advocates of these groups.

### **Application to Wisconsin**

Wisconsin's Specialized Transportation Assistance for Counties or "85.21" program application requires that 85.21 projects be identified in one of the strategies of the coordinated plan. WisDOT has determined that since these are county projects and the basis for the county

elderly and disabled services, these projects should be referenced in the county's coordinated plan.

The purpose of this plan document is to achieve the above objectives by satisfying minimum reporting-requirements as identified by WisDOT. Additional tools and information for Locally Developed, Coordinated Public Transit Human Services Transportation Plans is available on the Wisconsin Department of Transportation website at: <https://wisconsindot.gov/Pages/doing-bus/local-gov/astnce-pgms/transit/compliance/coord.aspx> .

## **OUTLINE OF COORDINATED PLANNING PROCESS**

Based on guidance from WisDOT and its experience with development of the 2013 coordinated plans, the NCWRPC developed a planning process for the 2018 coordinated transportation plans as outlined below:

### I. Plan for Planning

- A. WisDOT - MPO/RPC Director's Meeting Briefing
- B. WisDOT Coordinated Planning Resources (webpage)
- C. NCWRPC Planning Process Established

### II. County Contact

- A. WisDOT Outreach to Counties
- B. NCWRPC Contact with 2013 "Plan Keeper"
  - 1. Confirm "Plan Keeper" Status
  - 2. Date, Time and Location Established

### III. Meeting Participant Invitation List Development

- A. County Review and Update of 2013 Stakeholder List
- B. County to Identify/Invite Users and Provide Transportation

### IV. Notification of Planning Meeting

- A. Invitations Distributed to Stakeholder List
- B. Flyer Provided to County for Posting and Distribution
- C. Encouragement of Website and Social Media Posts
- D. Notice Placed in Local Newspaper

### V. Public / Stakeholder Options for Participation / Comment

- A. Email / U.S. Mail
- B. Meeting Attendance

### VI. Planning Meeting

- A. Welcome and Introductions
- B. Review Background and Purpose of Meeting

1. Coordinated Planning Requirements
2. Review Transit Assistance Programs
- C. Identify Needs and Gaps
  1. Review Inventory of Services
  2. Review Demographic Data
  3. Review 2013 Coordinated Plan
  4. Brainstorm Needs and Gaps
- D. Identify Strategies and Actions to Address Needs and Gaps
  1. Review 2013 Coordinated Plan
  2. Brainstorm Strategies and Actions
- E. Prioritize Strategies and Actions
- F. Wrap-up
  1. Plan Approval
  2. Meeting Evaluations

## VII. Report Drafting

- A. NCWRPC Draft Report
- B. County Review
- C. Submission of Final to WisDOT via BlackCat Grants Management System

## **OVERVIEW OF PLANNING MEETING TO DEVELOP COORDINATED PLAN**

### **Meeting Format**

On July 31, 2018, Lincoln County transportation stakeholders met at the County Administrative Services Center in Merrill to build their locally developed coordinated plan. Meeting documentation is included in APPENDIX A. Approximately 14 transportation stakeholders attended this meeting. Many more were invited including representatives of public, private and non-profit transportation and human services providers and users including seniors and individuals with disabilities. Participants were asked to sign-in and given handouts including an agenda, meeting evaluation form, copies of FAST Act and funding program background material, county transportation services inventory, county demographic information, and the gaps & needs and coordinated strategies sections of the county's 2013 plan.

The NCWRPC facilitated this session, presenting background material and guiding the group through the agenda. Highlights of the background provided by the NCWRPC include an overview of the locally developed plan requirements and grant funding programs. The Internet link to WisDOT's coordinated plans webpage was provided to give participants additional information and resources on coordinated transportation planning.

The format of the meeting centered around informal discussion and general consensus. The group brainstormed transportation service gaps & needs and strategies & actions to address the identified needs or gaps. The final list of strategies was prioritized by the group through weighted voting for their three most important items listed. Refer to the sections titled *Service*

*Gaps and Needs & Strategies to Address Transportation Gaps and Needs in Lincoln County,* below, for the outcomes of this session.

**Meeting Invitation and Participant Lists**

The stakeholder invitation list for the July 31 meeting included 37 individuals, see APPENDIX B. Approximately 14 people attended the planning meeting as follows:

Lincoln County 2018 Coordinated Transportation Plan Participant List

<u>Name</u>	<u>Organization</u>	<u>Role</u>
Karalyn Peterson	MILC	Disability Advocate
Bobbi Hegna	CIL New Freedom Transportation	Transportation Service Provider
Kristine Shorey	Lincoln County Dept. of Social Services	Human Services Provider
Colleen Chartier	Lincoln County Dept. of Social Services	Transportation Service Provider
Renee Krueger	Lincoln County Dept. of Social Services	Director
Karen Johnson	Tomahawk Area Interfaith Volunteer	Human Services Provider
Joan Litwitz	Tomahawk Area Interfaith Volunteer	Transportation Service Provider
Riannon Kleinschmidt	Our Way Inc.	Assisted Living Provider
Jennifer Cummings	ADRC-CW	Human Services Provider
Brad Brummond	Merrill Transit	Transportation Service Provider
Sarah Brandner	Lincoln County Dept. of Social Services	Financial Program Manager
Diane Goetsch	Kindhearted Home Care	Assisted Living Provider
Brianne VandenHeuvel	Pine Crest Nursing Home	Assisted Living Provider
Carrie Sarazin	Pine Crest Nursing Home	Assisted Living Provider

**Keeper of the Plan**

The Lincoln County Social Services Department will continue to be the designated keeper of the plan. Colleen Chartier will be the primary staff contact.

**Summary of Participant Review**

The plan meeting participants were given the opportunity to complete an evaluation form rating the process, meeting, and implementation strategies. Most responses indicate a positive agreement regarding the process and the County's status. Refer to APPENDIX C for copies of the completed participant evaluation forms.

**ANALYSIS OF SERVICE GAPS AND NEEDS**

**Assessment of Existing Service**

An inventory of what transportation services are currently available in Lincoln County was compiled in the APPENDIX D. There are several transportation services available, however, geographic and eligibility restrictions limit this service. A general assessment of the inventory data indicates the following:



- Evening and weekend services are limited,
- Employment needs are underserved, and
- More rural, inter-city and across-county services are needed.

### **Demographic Information**

The NCWRPC provided demographic information in the form of countywide maps showing density of overall population and for target populations including seniors and individuals with disabilities, refer to APPENDIX E. This information is useful in assisting with defining gaps and needs.

### **Identification of Gaps and Needs**

Based on their experience and perceptions, meeting participants identified the following gaps and needs in the current transportation system within Lincoln County:

- Need for group transportation (for events, activities, etc.).
- Need for out of County service.
- Increase in referral to specialists out of area.
- Lack of knowledge/information regarding transportation options.
- Need for wheel accessibility.
- Need new volunteer drivers (retiring, busy).
- Limited vehicles (need accessible weekend events).
- Lack of service in rural/remote areas.
- MA transportation issues: wait time/don't show, leave stranded, etc.
- Lack of intercity transit.

### **STRATEGIES TO ADDRESS IDENTIFIED GAPS AND NEEDS**

The following strategies establish the framework for a five-year work program from 2019 through 2023. The listed strategies and actions were generated to address the identified gaps between current services and needs, as well as opportunities to improve efficiencies in service delivery.

The strategies are ranked by scores assigned by stakeholder meeting participant voting based on resources from multiple program sources, time, and feasibility for implementing the strategies or actions identified.

Some of the strategies listed here ultimately may be not be implemented within the five-year time timeframe due to changing conditions (political, fiscal, etc.). Uncompleted strategies and actions should be rolled over to the next five-year plan as appropriate.

**Lincoln County 5-year Transportation Coordinated Strategies, 2019 - 2023**

Priority  
Rank    Score

- |    |    |   |
|----|----|---|
| 1. | 17 | Maintain and expand existing services through support of program operations (inc. director/transportation coordinator position(s), driver salaries, volunteer reimbursements, equipment, supplies and training), maintenance, repair and scheduled replacement of vehicle fleet as appropriate. |
|----|----|---|

Actions:

- Continue to make use of 85.21 Grants to maintain and expand the level of transportation service within the County.
- Continue to apply for 5310 Capital Grants to maintain and expand the human services transportation vehicle fleet within Lincoln County.

- |   |    |   |
|---|----|---|
| 2 | 16 | Develop and increase circulation of brochure of services available. |
|---|----|---|

Actions:

- Provide system information through a variety of online and print means (newsletters, provider directories, etc.)
- Promote transportation services through social media and community partnerships.

- |    |    |   |
|----|----|---|
| 3. | 12 | Continue to support volunteer driver program. |
|----|----|---|

Actions:

- Apply for 85.21 Grants to expand and maintain the volunteer driver program within the County.
- Explore ways to increase number of volunteer drivers available to the program.

- |    |   |   |
|----|---|---|
| 4. | 7 | Increase outreach to increase volunteer drivers (churches, community service groups, etc.). |
|----|---|---|

5. 6 Advocate for legislative changes regarding volunteer driver insurance coverage (contact with legislators, possible county resolution, etc.).
6. 2 Work to increase internet access throughout County (to facilitate access to transportation information).
7. 1 Explore 1-call-center options.
8. 0 Support / Coordinate with Regional Volunteer Driver Program to reinforce local program and fill in gaps in service.  
 Actions:
  - Work with Center for Independent Living for Western Wisconsin (aka CIL) to determine how to best integrate expansion of CIL's Regional Volunteer Driver Program into Lincoln County Transportation Program.
9. 0 Facilitate annual transportation coordination meeting to continue to explore ways to increase/improve coordination of transportation services within Lincoln County.
10. 0 Develop Tomahawk-Merrill-Wausau service.

**UPDATING / AMENDING THE COORDINATED PLAN**

The coordinated plan establishes the framework for a five-year work program. However, should a strategy or project be identified that was not foreseen at the time of plan development, the plan can be amended through some form of stakeholder consensus process. The plan should be regularly reviewed and updated if major changes in any provisions of the plan are identified. At a minimum, the plan is required to be updated every five years.

**APPROVAL OF 2019 - 2023 LINCOLN COUNTY TRANSPORTATION COORDINATED PLAN**

After the identified strategies and actions were reviewed by the planning group and consensus was reached that their work was complete, the NCWRPC meeting facilitator entertained a motion on the question of approving the established five-year strategy and action plan:

*On a motion by Brad Brummond, seconded by Renee Krueger, the 2019 - 2023 Lincoln County Locally Developed, Coordinated Public Transit-Human Services Transportation Plan was approved with all in favor.*



NCWRPC - Lincoln County  
 Coordinated Public Transit - Human Services Transportation Plan  
 Development Meeting - July 31, 2018

	Name	Representing	Role (Service Provider, User, etc.)
1	Kristine Shorey	LCSS	Service Provider
2	Colleen Chartier	LCSS	Service provider
3	Renee Krueger	LCSS	Director
4	Sarah Johnson	TAIV. <small>(Tomahawk Area Interfaith Volunteers)</small>	Board President
5	Robbi Hanna	Cilwou/New Freedom	Service Provider
6	Joan Litwitz <small>Litwitz</small>	TAIV	Program Director
7	Siannan Kleinschmidt <small>Riannon</small>	Our Way line	Director
8	Jennifer Gernmings	ADR & ceu	Director Agency + Wellness
9	Brad Brummond	Merrill Transit	Administrator
10	Sarah Brandner	LCSS	Accountant
11	Diane Goetsch	Kindhearted HomeCare	OWNER
12	Brianna Vandenberg	Pine Crest <small>Nursing Home</small>	Rec Director
13	Carrie Sarazin	Pine Crest	Bus. Office
14			
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25			

## LINCOLN COUNTY

### 2019 LOCALLY DEVELOPED COORDINATED PUBLIC TRANSIT- HUMAN SERVICES TRANSPORTATION PLAN MEETING

JULY 31, 2018

#### AGENDA

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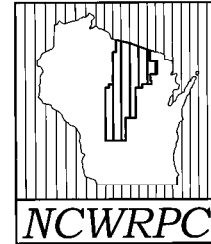
- I. WELCOME AND INTRODUCTIONS
  
  - II. PURPOSE OF MEETING and BACKGROUND
  
  - III. IDENTIFICATION OF SERVICE NEEDS AND GAPS
    - A. Review of Demographic Data
    - B. Review of Service Inventory
  
  - IV. IDENTIFICATION AND PRIORITIZATION\* OF STRATEGIES AND ACTIONS TO ADDRESS NEEDS AND GAPS
    - \* Based on consideration of resources, time and feasibility.*
  
  - V. WRAP-UP
    - A. Plan Approval
    - B. Meeting Evaluation
- 

For more information and resources on Locally Developed Coordinated Public Transit-Human Services Transportation Planning visit:

<http://wisconsin.gov/Pages/doing-bus/local-gov/astnce-pgms/transit/compliance/coord.aspx>

# NORTH CENTRAL WISCONSIN REGIONAL PLANNING COMMISSION

210 McClellan Street, Suite 210, Wausau, Wisconsin 54403  
Telephone: (715) 849-5510 Fax: (715) 849-5110  
Web Page: [www.ncwrpc.org](http://www.ncwrpc.org) Email: [staff@ncwrpc.org](mailto:staff@ncwrpc.org)



SERVING ADAMS, FOREST, JUNEAU, LANGLADE, LINCOLN, MARATHON, ONEIDA, PORTAGE, VILAS AND WOOD COUNTIES

## **MEMORANDUM**

**DATE:** July 9, 2018  
**TO:** Parties with interest in Human Services Transportation in Lincoln County  
**FROM:** Darryl L. Landeau, AICP  
**RE:** Invitation to Meeting

### **NOTICE OF HUMAN SERVICES TRANSPORTATION MEETING**

Please attend...

**DATE:** July 31, 2018  
**TIME:** 10:00 am  
**LOCATION:** Lincoln County Service Center, Room 156  
801 N Sales Street, Merrill

A county meeting is scheduled for stakeholders in public transit / human services transportation coordination for Lincoln County on Tuesday, July 31 beginning at 10:00 A.M. The meeting will take place at the Lincoln County Service Center in Room 156, 801 N Sales Street in Merrill. This meeting will include an assessment of human services transportation needs and gaps within Lincoln County and identification of strategies to address these issues with emphasis on improving service coordination. ***Written comments may be submitted to: NCWRPC, 210 McClellan St. Ste. 210, Wausau WI 54403 or [dlandeau@ncwrpc.org](mailto:dlandeau@ncwrpc.org).***

If you have questions regarding this meeting, please contact me at [dlandeau@ncwrpc.org](mailto:dlandeau@ncwrpc.org) or 715-849-5510 extension 308. If you need transportation assistance to this meeting or other accommodations, please contact the Lincoln County Social Services Dept at (715) 536-6200.

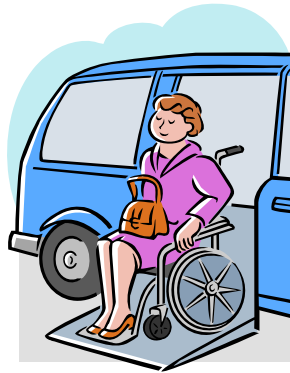
### **BACKGROUND ON MEETING**

The federal surface transportation program requires applicants for the Elderly and Disabled Transportation Program (5310) grants, as well as state 85.21 projects must be part of a "locally-developed, coordinated public transit-human services transportation plan." This plan is required to be developed through a process that includes representatives of public, private, and non-profit transportation services, human services providers and the general public.

To maintain local eligibility for these grants, the Wisconsin Department of Transportation has developed a county meeting process to comply with federal requirements. Regional Planning Commission (RPC) planners are coordinating and conducting these meetings statewide on behalf of WisDOT and the counties as independent and objective entities. Your participation is critical for the development of a qualifying plan that will effectively serve Lincoln County.

N:\DARRYL\REGION\TRANSPORTATION\COUNTYTRANSIT\COORDINATED2018\INVITATIONS2018\LINCOLN\_INVITE\_2018.DOC

## LINCOLN COUNTY ELDERLY & DISABLED TRANSPORTATION PLANNING MEETING



### PLEASE ATTEND...

A county meeting will be held to assess transportation programs for the elderly and disabled and develop plans to improve transportation services for those in need. The meeting will provide the basis for Lincoln County's Coordinated Public Transit - Human Services Transportation Plan as required under federal and state regulations. The meeting will be facilitated by the North Central Wisconsin Regional Planning Commission on behalf of the Wisconsin Department of Transportation and Lincoln County.

DATE: July 31, 2018

TIME: 10:00 AM

LOCATION: Lincoln County Service Center  
Room 156  
801 N. Sales Street, Merrill

For transportation assistance or other accommodations, please contact the County Social Services Department at (715) 536-6200.

***Written comments may be submitted to: NCWRPC, 210 McClellan St. Ste. 210, Wausau WI 54403 or [staff@ncwrpc.org](mailto:staff@ncwrpc.org).***

For information about the meeting contact NCWRPC at 715-849-5510 or email [staff@ncwrpc.org](mailto:staff@ncwrpc.org).



# Affidavit of Publication

STATE OF WISCONSIN }  
COUNTY OF LINCOLN } SS

Dave Wood, being duly sworn, says:

That he is Publisher of the Merrill Courier, a weekly newspaper of general circulation, printed and published in Merrill, Lincoln County, Wisconsin; that the publication, a copy of which is attached hereto, was published in the said newspaper on the following dates:

July 20, 2018

That said newspaper was regularly issued and circulated on those dates.



Publisher

Subscribed to and sworn to me this 20th day of July 2018.



Beth Patterson, Lincoln County, Wisconsin

My commission expires: November 10, 2018

Publication Fees: \$ 160.24

An affidavit cost of \$1 is included in the Publication Fees listed above.

00054922 05391282

NORTH CENTRAL WISC. REGIONAL PLANNING  
COMMISSION  
210 MCCLELLAN STREET  
SUITE 210  
WAUSAU, WI 54403

## **Notice of Elderly and Disabled Transportation Public Meeting**

A county meeting will be held on Tuesday, July 31 beginning at 10:00 AM at the Lincoln County Service Center, Room 156, 801 N Sales Street, Merrill to assess transportation programs for the elderly and disabled and develop plans to improve transportation services for those in need. The meeting will provide the basis for Lincoln County's Coordinated Public Transit - Human Services Transportation Plan as required under federal and state regulations.

The North Central Wisconsin Regional Planning Commission (NCWRPC) is coordinating the meeting on behalf of WisDOT and the County. Those persons unable to attend the meeting and would like to submit comments in writing may send them to: NCWRPC, 210 McClellan St. Ste. 210, Wausau WI 54403 or email to [staff@ncwrpc.org](mailto:staff@ncwrpc.org).

Seniors or persons with disabilities who would like to attend the meeting and require a ride or other accommodations should contact the Lincoln County Social Services Department at 715-536-6200. The meeting location is accessible.

Published July 20, 2018

WNAXLP





ADRC-CW Merrill Office  
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Merrill, WI 54452

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Lincoln Co. Social Services  
607 N. Sales St., Ste. 202  
Merrill, WI 54452

Ralph Peterson Bus Service  
W4550 Co. Rd. G  
Merrill, WI 54452

Jason Hake  
Lincoln County Admin. Coordinator  
801 N. Sales St., Ste. 205  
Merrill, WI 54452

Richard Wolf  
Lincoln Co. Veterans Service  
801 N. Sales St., Ste 104  
Merrill, WI 54452

Wanda Kleinschmidt, - Director  
Lincoln Industries Workshop  
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Merrill, WI 54452

NCCAP - Merrill Office  
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Merrill, WI 54452

Midstate Independent Living  
Consultants, Inc.  
3262 Church Street, Suite 1  
Stevens Point, WI 54481

Tomahawk Senior Center  
113 S. Tomahawk Ave.  
Tomahawk, WI 54487

Tonja Fischer, Area Administrator  
WI DCF Northern Region  
2187 N. Stevens St. Ste C  
Rhineland, WI 54501

Lisa Gervais, Administrator  
Pinecrest Nursing Home  
2100 E. 6<sup>th</sup> Street  
Merrill, WI 54452

Lincoln County ARC, Inc.  
P.O. Box 143  
Merrill, WI 54452

Brad Brummond  
Merrill-Go-Round Transit System  
1004 East First Street  
Merrill, WI 54452

Kristine McGarigle  
Bell Towers Residence  
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Merrill, WI 54452

Our Way Inc.  
Riannon Kleinschmidt  
PO Box 76  
Tomahawk, WI 54487

Tomahawk Bus Service, Inc.  
1801 Kaphaem Road  
Tomahawk, WI 54487

Wendorf Bus Service  
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Diane Goetsch  
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Tomahawk Health Services  
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Neillsville, WI 54456

VSO Transportation Services  
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Rhineland, WI 54501

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Menomonie, WI 54751

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Robert Lee, County Board Chair  
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Merrill WI 54452

Dan Idzikowski  
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True Lor, Area Coordinator  
DHS Northern Region  
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Rhineland, WI 54501

Karalyn Peterson, Res. Coordinator  
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Joan Litwitz  
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Melissa Dengel  
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Lori Ugolini  
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Merrill Area Public Schools  
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Merrill, WI 54452

Freedom Vans, LLC  
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Bryant, WI 54418

Inclusa Inc.  
Family Care MCO  
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Stevens Point, WI 54481

Katherine Strong, Director Pupil Ser  
Tomahawk School District  
1048 East King Rd  
Tomahawk, WI 54487

Lakeland Care Inc.  
Family Care MCO  
N6654 Rolling Meadows Dr.  
Fond du Lac, WI 54937

Blue Jay Taxi  
124 N. Prospect Street  
Merrill, WI 54452



# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln City
<b>Date:</b>	7.31.18
<b>Facilitator(s):</b>	

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree		Agree	Strongly Disagree		Don't Know
	1	2		4	5	6
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	3	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	2	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	1	2	3	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	2	3	4	5	6
5. The county/region has a working coordination team.	1	2	3	4	5	6
6. The previous coordination plan has been implemented.	1	2	3	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	2	3	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	3	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	2	3	4	5	6
10. The information was presented in a clear, logical format.	1	2	3	4	5	6

10. The time allotted for the meeting was:  too much  about right  not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

- Advocate for volunteer drivers/insurance.

12. List any information or meeting content you felt was omitted or needed further clarification.

- Needing vehicles
- Needing drivers
- Accessibility to drivers/volunteers

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

def. coordinate annually. - To see results or lack there of - Re-vamp ideas

14. Other comments (write on back)

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln County
<b>Date:</b>	7-31-18
<b>Facilitator(s):</b>	Darryl Landeau

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree		Agree	Strongly Disagree		Don't Know
	1	2		4	5	6
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	(3)	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	(2)	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	(1)	2	3	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	2	(3)	4	5	6
5. The county/region has a working coordination team.	1	2	3	4	5	(6)
6. The previous coordination plan has been implemented.	1	2	3	4	5	(6)
7. Developing the prioritized action plan was meaningful and valuable.	1	2	(3)	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	(3)	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	2	(3)	4	5	6
10. The information was presented in a clear, logical format.	1	2	(3)	4	5	6

10. The time allotted for the meeting was:  too much  about right  not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

14. Other comments (write on back)

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln
<b>Date:</b>	7/31/18
<b>Facilitator(s):</b>	Darryl Anderson

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree	Agree	Strongly Disagree	Don't Know		
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	3	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	2	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group. -	1	2	3	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	2	3	4	5	6
5. The county/region has a working coordination team. -	1	2	3	4	5	6
6. The previous coordination plan has been implemented. -	1	2	3	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	2	3	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	3	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	2	3	4	5	6
10. The information was presented in a clear, logical format.	1	2	3	4	5	6

10. The time allotted for the meeting was:  too much  about right  not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

14. Other comments (write on back)



# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln
<b>Date:</b>	7/31/2018
<b>Facilitator(s):</b>	Daryl

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree		Agree	Strongly Disagree		Don't Know
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	(3)	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	2	(3)	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	1	2	(3)	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	2	(3)	4	5	6
5. The county/region has a working coordination team.	1	2	(3)	4	5	6
6. The previous coordination plan has been implemented.	1	2	(3)	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	2	(3)	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	(3)	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	2	(3)	4	5	6
10. The information was presented in a clear, logical format.	1	2	(3)	4	5	6

10. The time allotted for the meeting was: \_\_ too much X about right \_\_ not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

14. Other comments (write on back)

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln
<b>Date:</b>	07/31/2018
<b>Facilitator(s):</b>	LDSS, etc. Darryl

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree		Agree	Strongly Disagree		Don't Know
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	(3)	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	(2)	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	1	2	(3)	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	2	(3)	4	5	6
5. The county/region has a working coordination team.	1	2	(3)	4	5	6
6. The previous coordination plan has been implemented.	1	2	(3)	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	2	(3)	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	(3)	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	(1)	2	3	4	5	6
10. The information was presented in a clear, logical format.	1	(2)	3	4	5	6

10. The time allotted for the meeting was:  too much  about right  not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

14. Other comments (write on back)

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln
<b>Date:</b>	7/31/2018
<b>Facilitator(s):</b>	Darryl

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree	Agree	Strongly Disagree	Don't Know		
1. The information covered in the group discussions, examples and explanations was understandable.	1	(2)	3	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	(2)	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	1	(2)	3	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	(2)	3	4	5	6
5. The county/region has a working coordination team.	1	2	(3)	4	5	6
6. The previous coordination plan has been implemented.	1	2	3	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	(2)	3	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	(2)	3	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	(1)	2	3	4	5	6
10. The information was presented in a clear, logical format.	(1)	2	3	4	5	6

10. The time allotted for the meeting was:    too much    about right    not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

14. Other comments (write on back)

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	<i>Lincoln</i>
<b>Date:</b>	<i>9/31/18</i>
<b>Facilitator(s):</b>	

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree	Agree	Strongly Disagree	Don't Know		
1. The information covered in the group discussions, examples and explanations was understandable.	1	(2)	3	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	(1)	2	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	1	2	(3)	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	(2)	3	4	5	6
5. The county/region has a working coordination team.	1	(2)	3	4	5	6
6. The previous coordination plan has been implemented.	1	(2)	3	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	(2)	3	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	(3)	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	(2)	3	4	5	6
10. The information was presented in a clear, logical format.	1	(2)	3	4	5	6

10. The time allotted for the meeting was:    too much    about right    not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

*- value for drivers*  
*- availability of resources*

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

14. Other comments (write on back)

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	<i>Lincoln</i>
<b>Date:</b>	<i>7-31-18</i>
<b>Facilitator(s):</b>	<i>Darryl Lundev</i>

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree		Agree	Strongly Disagree		Don't Know
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	(3)	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	(2)	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	(1)	2	3	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	2	(3)	4	5	6
5. The county/region has a working coordination team.	1	2	(3)	4	5	6
6. The previous coordination plan has been implemented.	1	2	(3)	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	2	(3)	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	(3)	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	(2)	3	4	5	6
10. The information was presented in a clear, logical format.	1	(2)	3	4	5	6

10. The time allotted for the meeting was: \_\_ too much  about right \_\_ not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability.

14. Other comments (write on back)

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln
<b>Date:</b>	7/31/2018
<b>Facilitator(s):</b>	

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree		Agree	Strongly Disagree		Don't Know
	1	2	3	4	5	6
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	(3)	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	(2)	3	4	5	6
3. Participants at the meeting were from a broad stakeholder group.	1	2	(3)	4	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	(2)	3	4	5	6
5. The county/region has a working coordination team.	1	2	(3)	4	5	6
6. The previous coordination plan has been implemented.	1	2	(3)	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	(2)	3	4	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	(2)	3	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	(2)	3	4	5	6
10. The information was presented in a clear, logical format.	1	2	(3)	4	5	6

10. The time allotted for the meeting was:  too much  about right  not enough *It would have been nice to know how long it was going to be*

11. List key points/issues presented during the meeting that were the most valuable or useful. *Good to express needs- NEED w/ accessibility!*

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability. *no*

14. Other comments (write on back)  
*Thank you!*

# Meeting Evaluation Form

## (2019-2023) Coordinated Planning Meeting

<b>County/Region:</b>	Lincoln
<b>Date:</b>	7-31-18
<b>Facilitator(s):</b>	Darrell Landeau

Instructions: For each item below, please circle the number/response that best expresses your opinion.

General Meeting Questions	Strongly Agree		Agree	Strongly Disagree		Don't Know
	1	2		4	5	6
1. The information covered in the group discussions, examples and explanations was understandable.	1	2	(3)	4	5	6
2. The meeting provided a good forum for communication about public/human services transportation coordination.	1	2	3	(4)	5	6
3. Participants at the meeting were from a broad stakeholder group.	1	2	3	(4)	5	6
4. The county/region's prioritized action plan is comprehensive and realistic.	1	2	(3)	4	5	6
5. The county/region has a working coordination team.	1	(2)	3	4	5	6
6. The previous coordination plan has been implemented.	1	2	(3)	4	5	6
7. Developing the prioritized action plan was meaningful and valuable.	1	2	3	(4)	5	6
8. I feel the coordination process in the county/region will be improved based on the assessment, action plan and implementation strategies.	1	2	(3)	4	5	6
<b>Facilitator Questions</b>						
9. Facilitator was knowledgeable about the meeting process.	1	2	(3)	4	5	6
10. The information was presented in a clear, logical format.	1	2	(3)	4	5	6

10. The time allotted for the meeting was: \_\_ too much X about right \_\_ not enough

11. List key points/issues presented during the meeting that were the most valuable or useful.

12. List any information or meeting content you felt was omitted or needed further clarification.

13. Are you interested in participating on the team that will implement the coordination plan strategies? If yes, indicate your availability. yes

14. Other comments (write on back)

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Lincoln County Provider Inventory



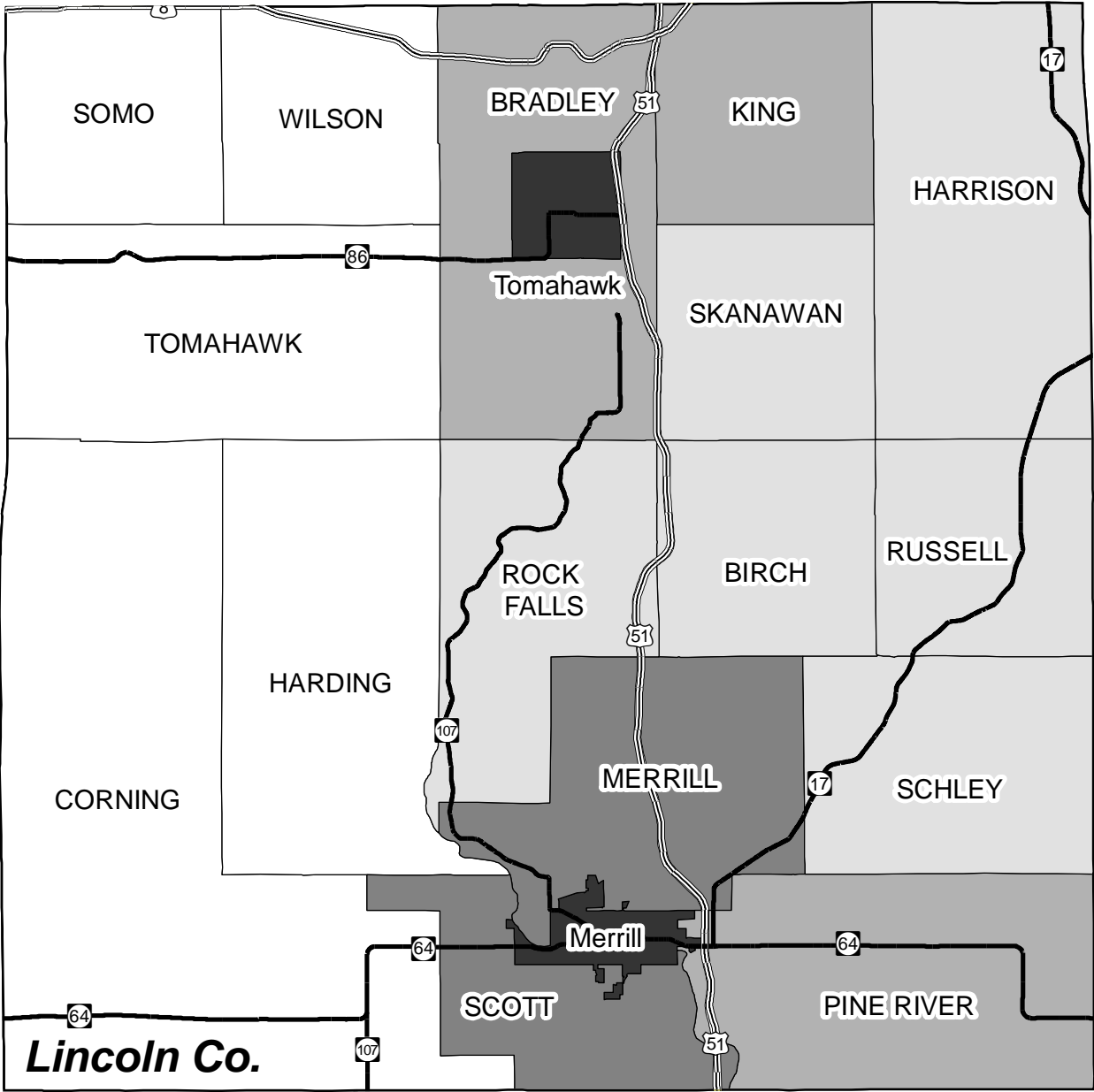
**TABLE 1 LINCOLN COUNTY PROVIDER INVENTORY**

Service Name or Sponsor Name	Service Type	Passenger Eligibility	Service Description	Hours of Service	Fleet Information	Use of Federal/ State Funds
<b>Lincoln County</b>						
Lincoln County A.R.C. (Lincoln Industries)	Specialized	Mentally disabled	Demand response (door-to-door) in rural Merrill area and both rural and in-city routes in the Tomahawk area.	Mon.-Fri. 6 – 9:30 a.m. & 2 – 5:30 p.m.	Two mini-busses, two vans that hold 7 seated and two wheelchair bound passengers, and one passenger van that holds two seated and one wheelchair bound passenger.	85.21
Lincoln County A.R.C. (Merrill-GoRound)	Specialized	Mentally disabled	Demand response (door-to-door). All City of Merrill transportation provided through a service agreement	Mon.-Fri. 7 am - 5 pm	Five 27-passenger busses. Each bus holds 24 seated and two wheelchair bound passengers.	85.21
Pine Crest Nursing Home	Flexible route	Elderly	Flexible route. Pre-determined destinations in Merrill area.		Pine Crest has a van that holds two wheelchairs; Lincoln Industries has a van that holds 6 seated and one wheelchair bound passenger; bus company bus that holds 4 wheelchair bound and 22 seated passengers; and other van companies that can transport one wheelchair at a time.	85.21
Lincoln County Social Services (Support Services)	Volunteer-escort	Elderly and people with disabilities	Demand response (door-to-door) by volunteer driver escort, serving all of County	24 hours a day, 7 days a week if a driver is available	Private vehicles owned by volunteer drivers.	85.21
Lincoln County Social Services (Merrill-Go-Round)	Public Transit	Elderly and people with disabilities	Demand response (door-to-door) in City of Merrill.	Mon.-Fri. 7am – 5pm	Five 27-passenger busses. Each bus holds 24 seated and two wheelchair bound passengers.	85.21
Lincoln County Social Services (Medical Escort)	Specialized	Elderly and people with disabilities	Demand response (door-to-door) by volunteer driver escort, serving all Lincoln County residents for medical appointments within Wisconsin.	24 hours a day, 7 days a week if a driver is available	Private vehicles owned by volunteer drivers.	85.21
Tomahawk Senior Shuttle	Specialized	Elderly and people with disabilities	Local shopping weekly and Rhinelander shopping one time per month. Supported by local bank.	Local every Wednesday and Rhinelander 2 <sup>nd</sup> Tuesday of the month - Call for reservations	1 van w/ lift	
New Freedom Regional Volunteer Driver Program (CILWW)	Volunteer Driver	Elderly and Individuals with Disabilities	Demand response Not limited to medical. Program under development in North Central WI.	24/7 subject to driver availability. 48 hour advance notice.	N/A	5310 / Partner Agreements



# Population Density / By MCD

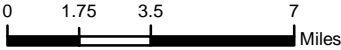
Lincoln County



## Legend

POP / Sq. Mi

- < 5
- 5 to 10
- 10 to 20
- 20 to 50
- > 50



Source: WI DNR, NCWRPC, US Census ACS 2012-16

This map is neither a legally recorded map nor a survey and is not intended to be used as one. This drawing is a compilation of records, information and data used for reference purposes only. NCWRPC is not responsible for any inaccuracies herein contained.



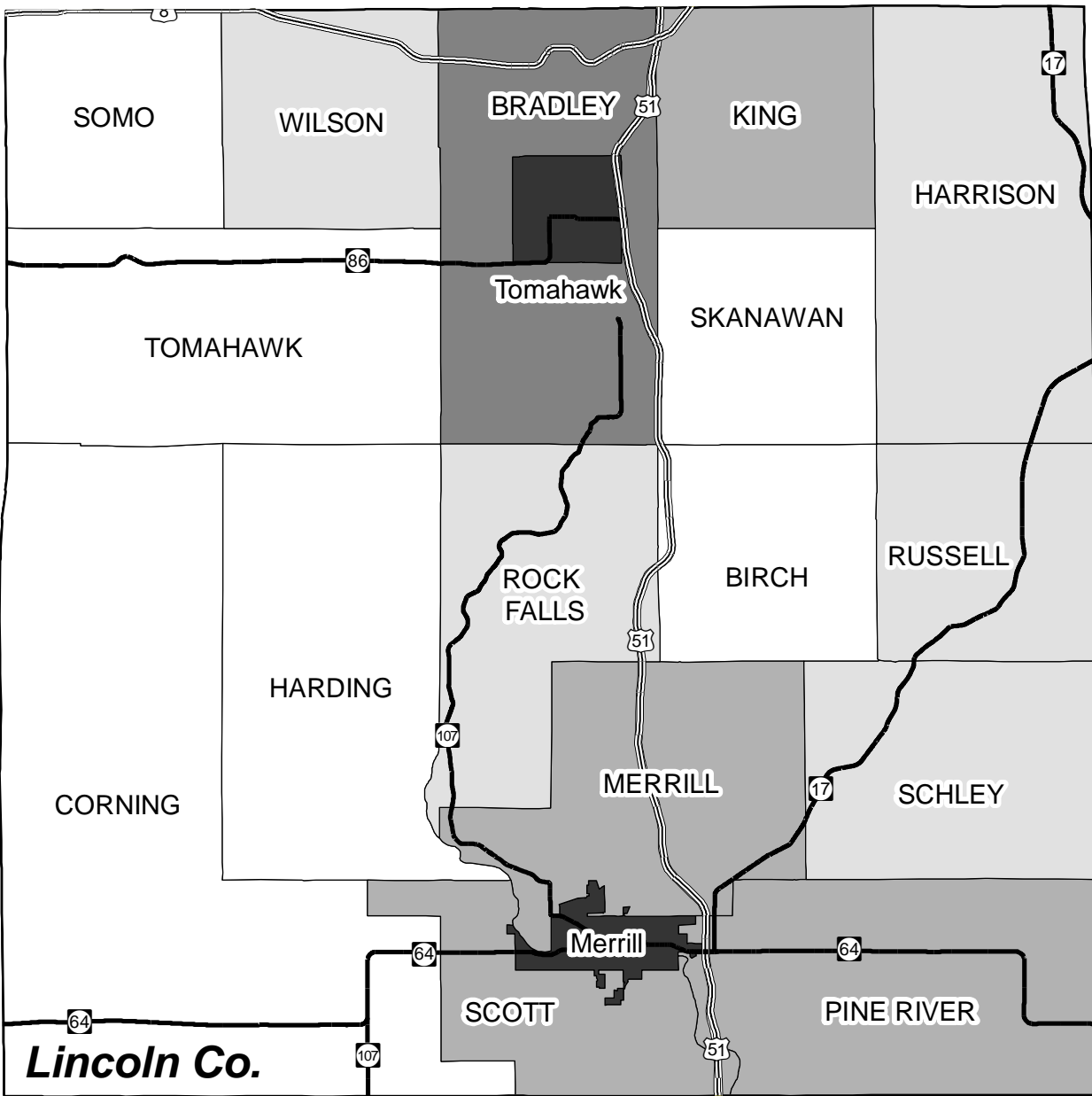
Prepared By:

**North Central  
Wisconsin Regional  
Planning Commission**

210 McClellan St., Suite 210, Wausau, WI 54403  
715-849-5510 - staff@ncwrpc.org - www.ncwrpc.org

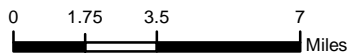
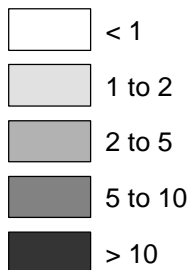
# Population Density of Persons over 65 / By MCD

Lincoln County



## Legend

POP65 / Sq. Mi



Source: WI DNR, NCWRPC, US Census ACS 2012-16

This map is neither a legally recorded map nor a survey and is not intended to be used as one. This drawing is a compilation of records, information and data used for reference purposes only. NCWRPC is not responsible for any inaccuracies herein contained.



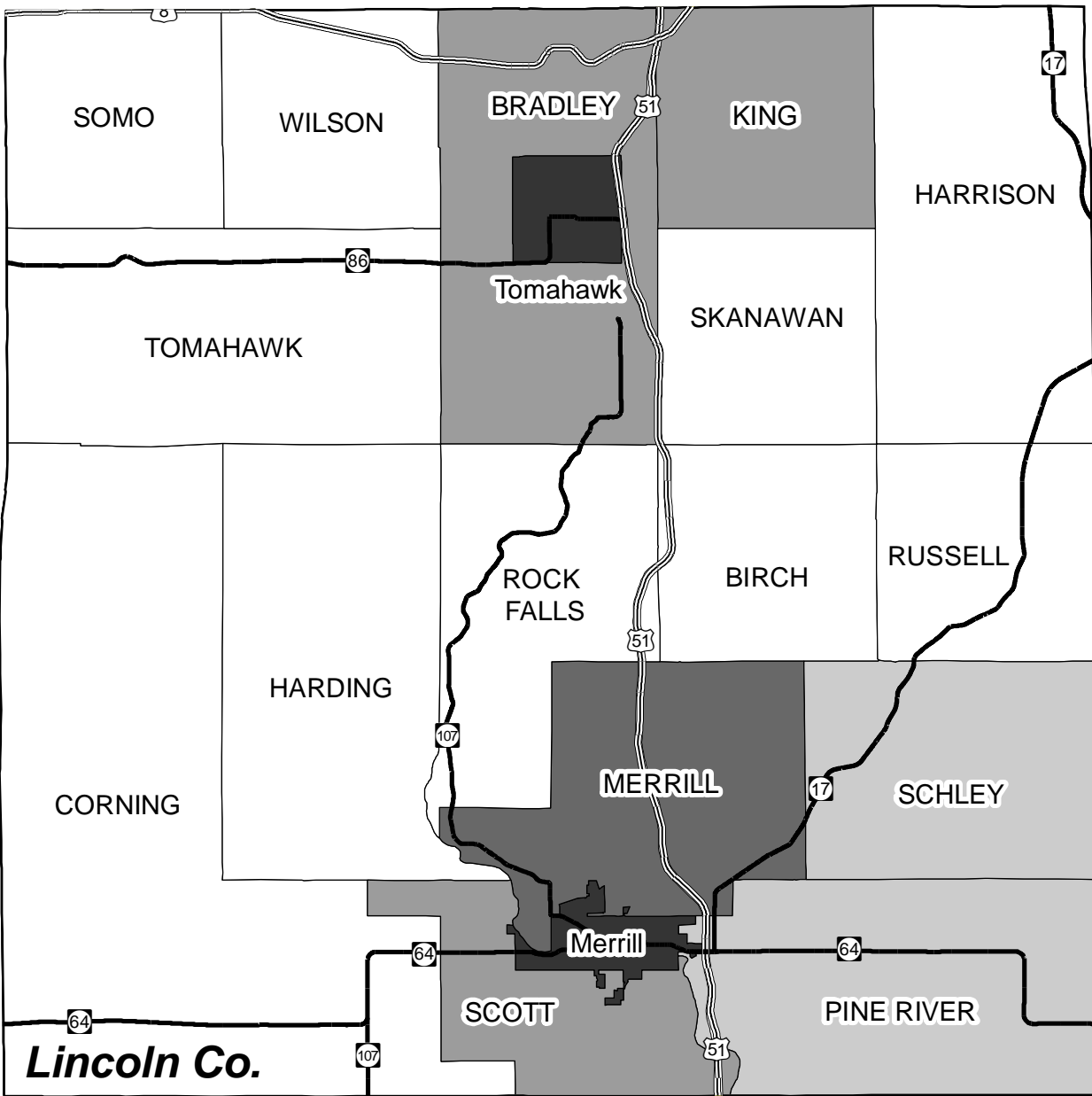
Prepared By:

**North Central  
Wisconsin Regional  
Planning Commission**

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715-849-5510 - staff@ncwrpc.org - www.ncwrpc.org

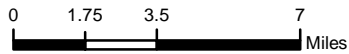
# Population Density of Persons with Disabilities / By MCD

Lincoln County



## Legend

DISABLED / Per Sq. Mi



Source: WI DNR, NCWRPC, US Census ACS 2012-16

This map is neither a legally recorded map nor a survey and is not intended to be used as one. This drawing is a compilation of records, information and data used for reference purposes only. NCWRPC is not responsible for any inaccuracies herein contained.



Prepared By:

**North Central  
Wisconsin Regional  
Planning Commission**

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Volunteer Driver Insurance Information

# Volunteers and Insurance

OFFICE OF THE COMMISSIONER OF INSURANCE

PI-236 (R 09/2017)

We are fortunate in Wisconsin to have so many people willing to volunteer to help a charity of their choice. Volunteering can take many different forms. A volunteer may be manning a food tent, selling brats and hot dogs to picnic patrons in order to raise money for an organization; transporting meals to the disabled; providing rides to veterans; or serving on a board of directors.

For both the organization and the volunteer, there are important insurance issues. For example, what happens if a volunteer driver is in an accident? Or what happens if a volunteer trips and lands on top of the grill while the grill is still cooking those delicious Wisconsin brats?

For organizations utilizing volunteers, it is important to understand your insurance benefits and how your policies may impact your volunteer's insurance coverage. In some cases, insurance coverage will be impacted if the organization reimburses the volunteer for their expenses. If you have a board of directors, your liability coverage may or may not extend to the board's actions and you may need to secure additional coverage.

For volunteers, the issues are equally important. Before engaging in volunteer activities, it is important to ask your insurance agent or your insurance company about coverage for the activities you are engaging in, and remember the details matter. In some cases the coverage provided by your personal insurance may be limited if you accept any reimbursement for your volunteer activities even if the reimbursement only covers some of your expenses.

## Auto Insurance

The most important point to remember is personal auto insurance policies vary on their treatment of volunteer driving activities. In almost all cases, the insurer will provide coverage for volunteers in which there is no reimbursement for expenses. However, if the organization provides any reimbursement, even if it is just for some of the expenses incurred by the driver, some insurers will treat this as a commercial activity.

Volunteer drivers should clarify if the organization for which you are volunteering is already covered under a commercial auto insurance policy. If not, a discussion with your insurance agent or insurance company may

clarify the issues for you. You may be able to purchase a separate rider on your policy. If your insurer limits coverage and volunteering is important to you, you may be able to find an insurance company which will provide coverage under your personal auto policy. (See the attached list of insurance carriers offering volunteer driver coverages.)

For volunteer organizations engaging drivers, it is important to have a discussion with your drivers. Reimbursement policies may vary from insurer to insurer. Commercial policies covering your drivers may also be another option.

## Liability Insurance

Liability insurance provides coverage for damages and legal defense in cases where the actions of the organization have resulted in some harm to a person or property. There are a number of types of liability coverage including:

### Directors and Officers

This coverage provides protection to directors and officers from claims which arise from negligent conduct committed in their capacity as directors and officers.

### Comprehensive General Liability

This type of policy provides many liability coverages under one contract.

### Multi-Peril

Though it is possible to purchase many separate insurance policies to cover a single business operation, this may be impractical. Therefore, you may want to buy a multi-peril policy. This is a comprehensive policy tailored to suit your business needs providing both property and liability protection. For many businesses it is the most efficient and economical way to buy insurance.

### Umbrella and Excess Liability

Umbrella liability insurance provides two kinds of coverage: payments of liabilities in excess of loss offered in your basic commercial policy, auto liability, or employers' liability coverages and liability for areas not covered in other liability policies.

Excess liability coverage provides protection for catastrophic accidents or occurrences, such as when a number of people are injured at once. The main difference between excess and umbrella policies is umbrella policies cover all underlying liability policies whereas excess liability policies increase the limits of liability in one particular policy.

### **Worker's Compensation**

Generally, volunteer workers are exempt from the worker's compensation requirements in the statutes. Specifically, as detailed in the *Consumer's Guide to Worker's Compensation Insurance for Employers*:

A volunteer for a nonprofit organization that is exempt or eligible for exemption from federal income taxation under the Internal Revenue Code who receives nominal payments of money or other things of value totaling not more than \$10.00 per week is not considered to be an employee under the Act, unless the nonprofit organization elects to cover the volunteer under its policy.

Volunteers who are injured while working as a volunteer will not have coverage for lost wages (at a job providing income) unless covered under another insurance policy such as a weekly income policy.

Organizations providing volunteers with compensation in excess of the statutory \$10.00 per week limit may want to explore their liability for any injuries their volunteers may incur while providing services.

### **Tips for Understanding Volunteer Insurance**

For volunteers:

1. Read your insurance policies to understand your coverage.
2. Talk to your insurance agent or your insurer about any concerns you may have.
3. Shop around for coverage. While one insurance company may not cover your volunteer activities, other insurers may.
4. Talk to the organization you will be volunteering for about insurance coverage.

For organizations:

1. Read your insurance policies to understand what is and is not covered.
2. Review your insurance coverage at least annually with your insurance agent.
3. Make sure your policies and procedures line up with your insurance coverage.
4. Before conducting any large public event, make sure you discuss coverage with your insurance agent and/or your insurer.
5. Discuss any insurance issues with your employees and volunteers to make sure there is coverage in case of an unfortunate event.

### **List of Insurers Offering Volunteer Coverage**

The following is a list of carriers operating in Wisconsin who insure volunteer drivers under their personal auto policies and cover claims occurring while using the insured vehicle for volunteer purposes. It is important to remember insurance companies reserve the right to make underwriting and claim judgements based on the individual risk or claim presented. Typically, it would be expected that volunteer driving would not be on a regular basis and would be incidental to the overall usage of the vehicle. It is not unreasonable for a company to require proof—particularly in the event of a claim—the reimbursement was based on actual expenses incurred and/or the mileage reimbursement was based on IRS guidelines.

*The Office of the Commissioner of Insurance recommends consumers read their policy in detail for information addressing volunteer coverage as well as contacting their carrier with additional questions or clarifications.*

State of Wisconsin  
Office of the Commissioner of Insurance  
P.O. Box 7873  
Madison, WI 53707-7873  
oci.wi.gov



Insurance Carriers Offering Volunteer Driver Coverages  
(listed in alphabetical order)

21st Century Centennial Company	Horace Mann Insurance Company
Acuity, A Mutual Insurance Company	Horace Mann Property & Casualty Insurance Company
AIG Property Casualty Company	IDS Property Casualty Company
Allstate Indemnity Company	IMT Insurance Company
Allstate Insurance Company	Integrity Mutual Insurance Company
Allstate Property and Casualty Company	Integrity Property and Casualty Insurance Company
American Family Mutual Insurance Company	Liberty Mutual Insurance Group (all Liberty companies)
American Standard Insurance Company of WI	Mid-Century Insurance Company
Artisan and Truckers Casualty Company	National General Insurance Company
Auto Club Group Insurance Company	Owners Insurance Company
Auto Club Insurance Association	Progressive Casualty Insurance Company
Auto Owners Insurance Company	Progressive Classic Insurance Company
Badger Mutual Insurance Company	Progressive Northern Insurance Company
Bristol West Insurance Company	Progressive Universal Insurance Company
Country Mutual Insurance Company	Rural Mutual Insurance Company
Country Preferred Insurance Company	Safeco Insurance
Dairyland Insurance Company	Sagamore Insurance Company
Electric Insurance Company	Secura Insurance
Erie Insurance Company	Sentry Insurance a Mutual Company
Erie Insurance Exchange	Standard Fire Insurance Company, The
Esurance Insurance Company	Teachers Insurance Company
Farmers Insurance Exchange	Travelers Home and Marine Insurance Company, The
GEICO	Travelers Property Casualty Insurance Company
GEICO Advantage Insurance Company	Viking Insurance Company of Wisconsin
GEICO Casualty Company	Wadena Insurance Company
GEICO General Insurance Company	West Bend Mutual Insurance Company
GEICO Indemnity Company	Wilson Mutual Insurance Company
General Casualty Company of Wisconsin	Wisconsin Mutual Insurance Company
Germantown Mutual Insurance Company	
Hartford Insurance Company, The	

*There may be other insurers who offer this type of coverage in Wisconsin. Check with your licensed insurance agent to explore your options.*