

Area Agency on Aging of Dane County 2022 Paul H. Kusuda Special Projects Fund Grant Application

The 2022 Paul H. Kusuda Special Projects Fund Grant augments Dane County-funded Client-Centered Case Management and related services provided by the 12 Senior Focal Points. It may cover all or part of one-time costs to meet any of the following Case Management Program needs:

- a. To continue or restore client services that had to be curtailed because of diminished staff time;
- b. To enable staff to attend staff development or in-service training (for example, tuition, books or other resources, transportation/lodging costs);
- c. To plan, develop, and provide new client service(s) heretofore thought to be evidence-based, unique, or needing application in a case-setting;
- d. To meet unexpected costs not included in the current budget (to include equipment, supplies, postage or services);
- e. To enable social research targeting program or technique effectiveness; or
- f. To fund other initiatives that either enhance case management services or improve the quality of life for financially eligible older adults served by this program.

The grant-funded project covers the period 1 January 2022 through 31 December 2022. Projects are limited to a minimum of \$500 and maximum of \$15,807.

Use this fillable form (**your responses must fit within the specified space**) and email it with letters of support to: aaa@countyofdane.com. Completed applications and letters of support must be received by **Friday, 18 February 2022, 4 pm**.

Proposal Information

Project Title	Case Load Acuity Tool
Amount Requested	\$15,807
Agency Name	NewBridge Madison
Agency Address	1625 Northport Drive, #125, Madison, WI 53704
Applicant Name	Jim Krueger
Applicant Phone Number	608-512-0000, Ext. 3005
Applicant Email Address	jimk@newbridgemadison.org

This project is: a **new project** *or* an **expansion** of an existing project.

*If planning to expand an existing project, attach a **one-page addendum** describing the nature and scope of the current project and how it will be expanded. Collaborations are encouraged.*

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PROPOSAL [50 points—two pages maximum]

Describe the proposal's focus, purpose, and steps that will be taken to meet the purpose.

The focus of the Case Load Acuity Tool proposal is to track client acuity based on older adults areas of need and the level of assistance provided to them. In case management, "acuity" refers to an individual's level or severity of needs and their level of dependency to access available resources. Acuity levels are classified into groupings (intensive/moderate/minimal/none) to translate the level of case management needs and assessment findings into a classification system. Each level has a point value and the number of points per client will determine each case managers' overall caseload acuity level.

Client acuity is tracked when an older adult begins receiving case management services and annually thereafter, or more frequently if there is a significant change in their life during the year that requires a re-evaluation of their needs. NewBridge would develop an acuity tool with approximately 30 categories of services (abuse/neglect, benefits, housing, etc.) most commonly requested by the older adults we serve. An acuity score for each category of service received is based on the clients level of need, ranging from no assistance necessary to immediate/intensive assistance required. When compared with the number of hours devoted to helping each client, this information will help determine if caseloads are balanced. The case managers years of experience and education level will also be factored in the acuity score.

Over the past 5-10 years, the complexity and severity of issues facing our clients has increased dramatically and the number of high acuity older adults has risen. Our case managers with higher caseload acuity are spending significantly more time with those clients and struggle to find time to check-in with their other clients or to add new clients. Our case load numbers are an arbitrary figure based on our service contract with Dane County. Because we lack hard data, case load assignment is often based on having an equal amount of clients rather than caseload acuity. The purpose of this proposal is to develop and implement a tool to help us determine appropriate case load sizes based on case load acuity for case managers. This would help spread high acuity clients more evenly and not all case managers would be expected to have the same number of clients. If a case manager has a slightly higher acuity caseload, they may have less clients assigned to them.

To meet the purpose of our caseload acuity and outcome measures project, NewBridge will implement the following steps:

- a. Research existing tools that have been developed to measure acuity levels.
- b. Customize a case load acuity scale tool to specifically measure the work of NewBridge case managers.
- c. Hire an IT consultant to incorporate the tool into the case management data base currently used by NewBridge.
- d. Develop a written manual explaining how the scale works and instructions for staff on how to use it for each client and define/assess outcome measures.
- e. Train case management staff on the value of the tool and how to use it.
- f. Create a reporting system and monitor case managers acuity scores monthly.
- g. Use the reports to determine the assignment of new clients.
- h. Provide a quarterly report to the AAA Manager
- i. Use the results to help determine contract numbers (clients served/hours of service) for the next contract year

The outcome of the Case Load Acuity Tool project is to have more manageable caseloads so NewBridge case managers may provide the highest quality services for clients and reduce staff burnout. The case

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management acuity scale tool will provide educated data to help us determine appropriate staffing needs and Dane County contract goals for NewBridge. It will also give NewBridge and Dane County a more accurate assessment of how many hours are needed to serve a client and the level of acuity of those we have served during any given year..

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QUALIFICATIONS [15 points—one page maximum]

Describe qualifications of the individual to be assigned major responsibility for the project. Include such elements as years of experience working with older adults and specific work skills to be used to complete this proposal.

Jennifer Brown, Case Manager Supervisor at NewBridge Madison, will take lead responsibility for this project. She has a Bachelors in Social Work degree from UW-Whitewater and Masters in Social Work from UW-Madison. Her concentration was in Health and Aging and she gained valuable experience in both research methods and statistics.

Jennifer was hired as a case manager at East Madison/Monona Coalition of the Aging (EMMCA) in 2015. At EMMCA, she helped in designing a customized case management database that is now used by NewBridge Madison and the Stoughton Area Senior Center. She has been involved in the development of the database since it's inception, working closely with the programmer, AAA staff and Focal Point case managers to tailor it to the case management program and meet Dane County reporting requirements. Jennifer will work closely with the computer programmer who developed the NewBridge case management data base to integrate the acuity scale tool into our existing data base.

At NewBridge, Jennifer handles a client caseload and manages a team of case managers. Jennifer has written a majority of the case management SOP's for NewBridge, some of which have been adopted by AAA for all Dane County Focal Points. Over the last several years, Jennifer has seen how client needs have increased; as a result, case managers are increasingly providing "complex" time-consuming case management services.

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Complete the following chart, indicating amount requested from the Special Projects Fund, matching funds from other sources, and the total cost of the project. [5 points]

Item	Amount Requested	Matching Funds*	Total Cost
Personnel	11582	524	12106
Space Costs	0	0	0
Supplies	0	0	0
Transportation	0	0	0
Equipment Rental	0	0	0
Other	4225	0	4225
TOTAL	15807	524	16331

* Cash or in-kind support.

Explain each budget item and why it is necessary for this project. [5 points]

Item	Why is this necessary?
Personnel	400 hours to develop and test the tool, write user manual, provide training & do any modifications/adaptations.
Space Costs	
Supplies	
Transportation	
Other	Computer programmer will need 65 hours to integrate the tool, and make adjustments, in our case management data base

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AGENCY COMMITMENT [15 points—one page maximum]

After the funding period is completed, what plans have been made to continue efforts or to use purchased equipment?

Once the case load acuity scale tool is finished, it will become a part on the NewBridge case management teams standard operating procedures. The tool will be used to assign and evaluate case manager caseloads throughout the year. The intent is to share/offer the acuity scale tool to the other Dane County Focal Points to use in the future. It would be available as a paper tool as well as electronically for those using a case management data base. The information gathered from the case load acuity tool will be valuable information if/when advocating for additional funding for case management services

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ORGANIZATIONAL OPERATIONS [10 points—one page maximum]

Who will have primary responsibility for overseeing successful completion of the proposed project? Specify either the percentage of staff time or number of hours per month to be devoted to this project and the qualifications of that staff member.

Jennifer Brown, Case Manager Supervisor at NewBridge Madison, will have primary responsibility for overseeing the completion of this project. She has a Bachelors in Social Work degree from UW-Whitewater and Masters in Social Work from UW-Madison. Her concentration was in Health and Aging and she gained valuable experience in both research methods and statistics.

Jennifer helped with the development and design of a customized case management database that is now used by NewBridge Madison and the Stoughton Area Senior Center. She was involved in the development of the database since it's inception, working closely with the programmer, AAA staff and Focal Point case managers to tailor it to the case management program and meet Dane County reporting requirements. Jennifer helped write the training manual for using the database. She has written a majority of the case management SOP's for NewBridge, some of which have been adopted by AAA for all Dane County Focal Points.

Jennifer will spend 400 hours over a six month period, about 66 hours per month, developing and testing the caseload acuity tool. Some of these hours will be coordinating with the computer programmer to install the tool on the case management data base. Writing a manual, training staff on how to use the tool and making modifications along the way.