

Dane County Client-Centered Case Management Program

(For senior adults 60 years and older)

Promoting Independence for Senior Adults



Aging Network

Dane County is fortunate to have a vast network of aging services and resources. Many are interdependent public, private partnerships that are community-based.

The Case Management Program is a partnership between Dane County government and geographically-defined agencies. Dane County funds this program through tax levy. The purpose of this partnership is to promote senior adult independence within our community for as long as possible. Dane County's Case Management Program is a contracted service of the Area Agency on Aging (AAA) of Dane County.

In November 2012, Dane County opened an Aging & Disability Resource Center (ADRC) – which provides short-term Information & Referral services. AAA & ADRC work collaboratively to meet the short and long-term needs of seniors in Dane County.



County Client-Centered
Case Management Program
(for adults age 60+)

What Are We?

Organized group of trained Case Management professionals whose primary goal is to provide older adults in Dane County the support they need to achieve and maintain optimum independence in their community through the assessment of need and the coordination and monitoring of community-based services

- Umbrella organization is the Area Agency on Aging (AAA) of Dane County (Department of Human Services)
- Case Managers follow the National Association of Social Workers' Code of Ethics and adhere to Case Management Standards as approved by the AAA Board of Directors

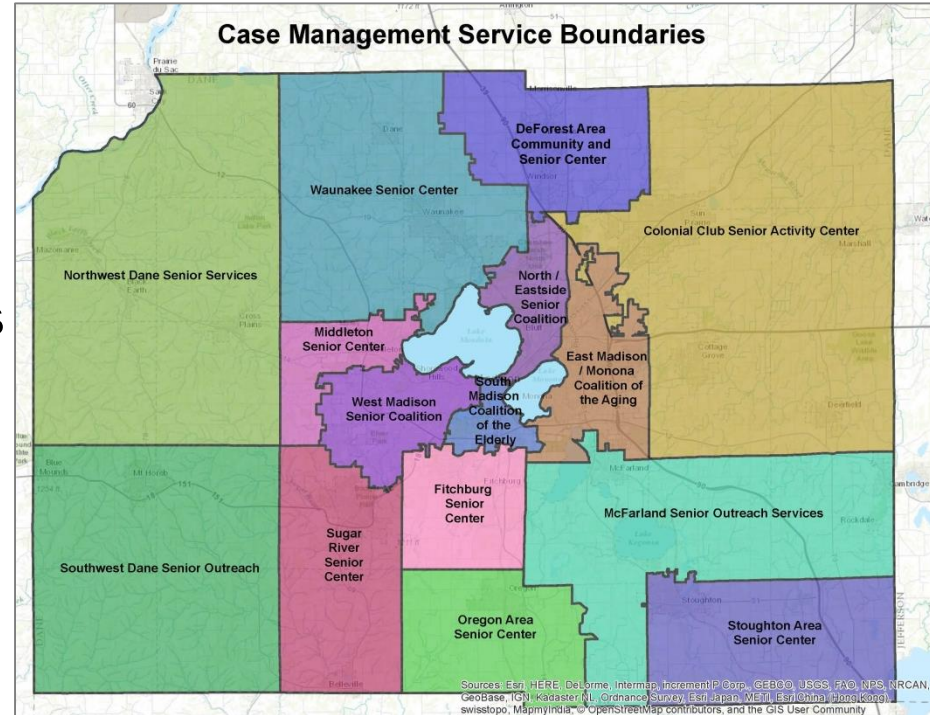


**Dane County Client-Centered
Case Management Program**
(for adults age 60+)

Where Are We?

Located in 15 agencies, called Focal Points, throughout Dane County

- In addition to Case Management Services, Focal Points also offer a senior nutrition program—in group settings and home-delivered meals
- Each Focal Point has designated service areas

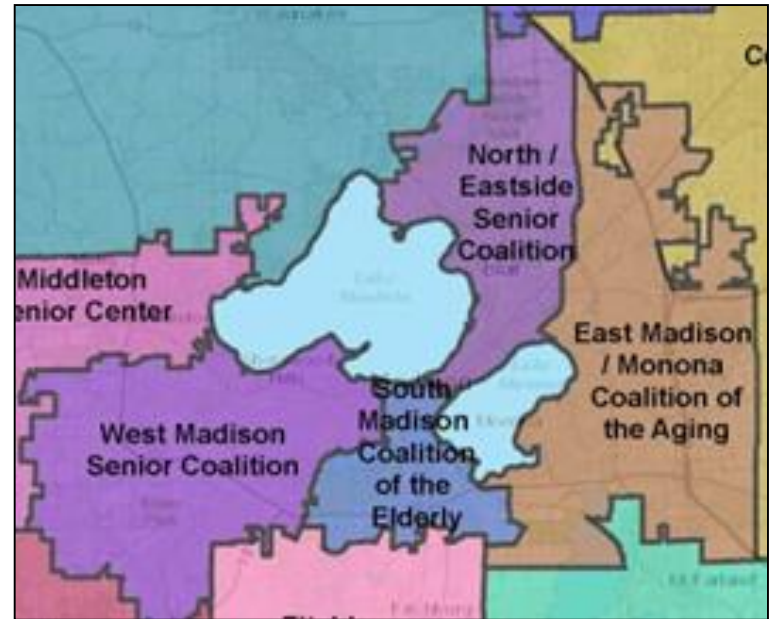


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Where Are We?

In the City of Madison, Focal Point agencies are known as Coalitions

- There are four Coalitions, each having designated areas; north, south, east, and west sectors
- In communities surrounding the City of Madison, Focal Point agencies are community Senior Centers



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Focal Points

Colonial Club Senior Activity Center

DeForest Area Community & Senior Center

East Madison/Monona Coalition of the Aging

Waunakee Senior Center

Fitchburg Senior Center

McFarland Senior Outreach Services

Middleton Senior Center

North/Eastside Senior Coalition

Northwest Dane Senior Services

Oregon Area Senior Center

South Madison Coalition of the Elderly

Southwest Dane Senior Outreach

Stoughton Area Senior Center

Sugar River Senior Center

West Madison Senior Coalition



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Who may utilize this program?

- Any adult age 60 years and older living in Dane County
- Recipients must fall below 240% of the Federal Poverty Level unless additional funding is available at each Focal Point
- Anyone desiring information regarding services and programs for senior adults may contact Focal Points, Aging & Resource Center (ADRC) of Dane County, or Area Agency on Aging (AAA) of Dane County



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Case Manager's Role



Case Managers assess the needs of the client and the client's family (when appropriate) and arrange, coordinate, monitor, evaluate, and advocate for multiple services to meet specific complex needs and preferences

- They conduct home visits to assess the needs of each senior adult and then develop individualized service plans for ongoing/ long-term services (the term “home” includes houses and apartments but not nursing homes or assisted living facilities)
- They provide professional assistance in a confidential manner



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Case Manager's Role



Client-centered case management is based on the recognition that a trusting and empowering direct relationship between Case Manager and client is essential to facilitate a client's use of services along a continuum of care and to restore or maintain independent functioning to the fullest extent possible. It requires the Case Manager to develop and maintain a professional relationship with the client, which may include linking the client with systems that provide needed advocacy, services, resources, and opportunities.



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Referrals

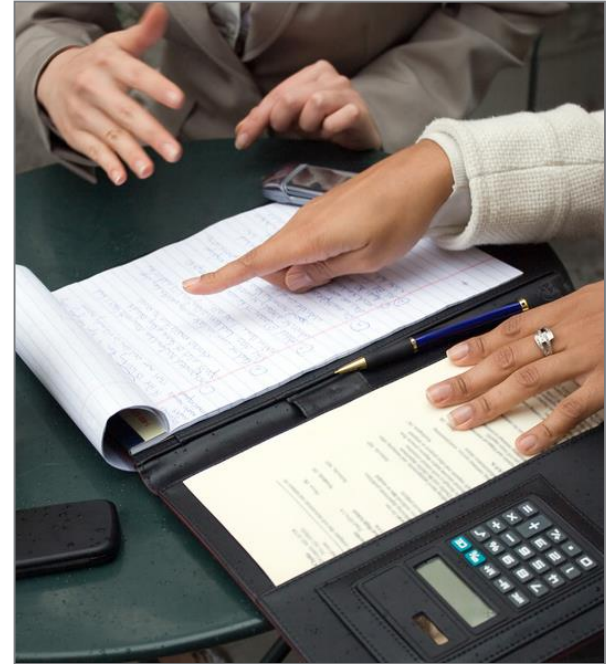
Referrals to the client-centered case management program come from individual older adults and their families, neighbors and friends, social service agencies (including ADRC), medical clinics, clergy, hospitals, and other professionals. During the referral process, the Case Manager attempts to gather initial information from the client in order to determine what assistance is needed.



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Assessment

Assessment is conducted during face-to-face meetings with the client, and information is gathered to determine whether the person needs on-going case management services. If appropriate, Client Intake and Functional Assessment forms are initiated. Requests for services are followed-up in a timely manner to determine eligibility for client-centered case management services.



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Service Plan



The primary goal of client-centered case management is to optimize client functioning by a thorough assessment of needs. Using this assessment, the Case Manager, with the client's input, develops a plan that will provide services in the most efficient and effective manner. Goals are developed and monitored.



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Information & Assistance (I&A)

This is a service of the Aging & Disability Resource Center (ADRC) of Dane County. It provides information to the general public about resources and programs in areas such as: disability and long-term care related services and living arrangements, health, adult protective services, employment and training for people with disabilities, transportation, home maintenance, and nutrition. ADRC I&A activities are not to exceed a period of 90 days and are thus not considered on-going case management.



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Focal Point Case Management

Face-to-face meeting with senior to review situation

Client Intake & Assessment Form completed

Determination of long-term case management needed (no time limit)

Service Plan Goals developed

Refer, arrange, and coordinate services

Monitor progress of goals

ADRC Information & Assistance

Provide information & answer questions

Make short term issue identification – limited to 60-90 days maximum
(continuation of long-term services are referred to Focal Points)

Help people understand long-term care services and choices available

Provide entry point for publically-funded long-term care options

Make available Disability & Elder Benefit Specialist services



Dane County Client-Centered Case Management Program *(for adults age 60+)*

Program Funding



- The Case Management Program is funded by Dane County, local communities, and United Way of Dane County (for some of the Focal Points)
- Dane County funds Case Management Services that target senior adults with monthly income falling below 240% of the Federal Poverty Level
- Focal Point Case Management is available to senior adults with monthly income above the 240% of poverty level—through other funding resources
- Donations are encouraged and welcomed



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County Funding

	%	Total
2013	41%	\$727,993
2014	40%	\$728,493
2015	45%	\$745,610
2016	40%	\$774,654
2017	39%	\$809,701



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Results

	Clients	Service Hours
2013	2,243	20,053
2014	2,325	20,081
2015	2,695	19,666
2016	2,927	22,631



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Evaluation—Customer Satisfaction

- Prior to 2014, Focal Points conducted annual surveys using their own forms
- In 2014, DCDHS worked with Focal Points to develop a uniform survey instrument; 100% of clients were surveyed
- 2015 - 2017 DCDHS conducted annual surveys of a random sample of clients
- Starting in 2018, DCDHS will conduct biennial surveys of a random sample of clients



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2016 CLIENT SURVEY RESULTS



Study Purpose

- To measure client satisfaction of case management services with the goal of using this input “in order to improve program efficiency and ensure the program is effectively helping senior adults.”

**AAA Access Committee
QTR 2, 2014 – Revised Work Plan**

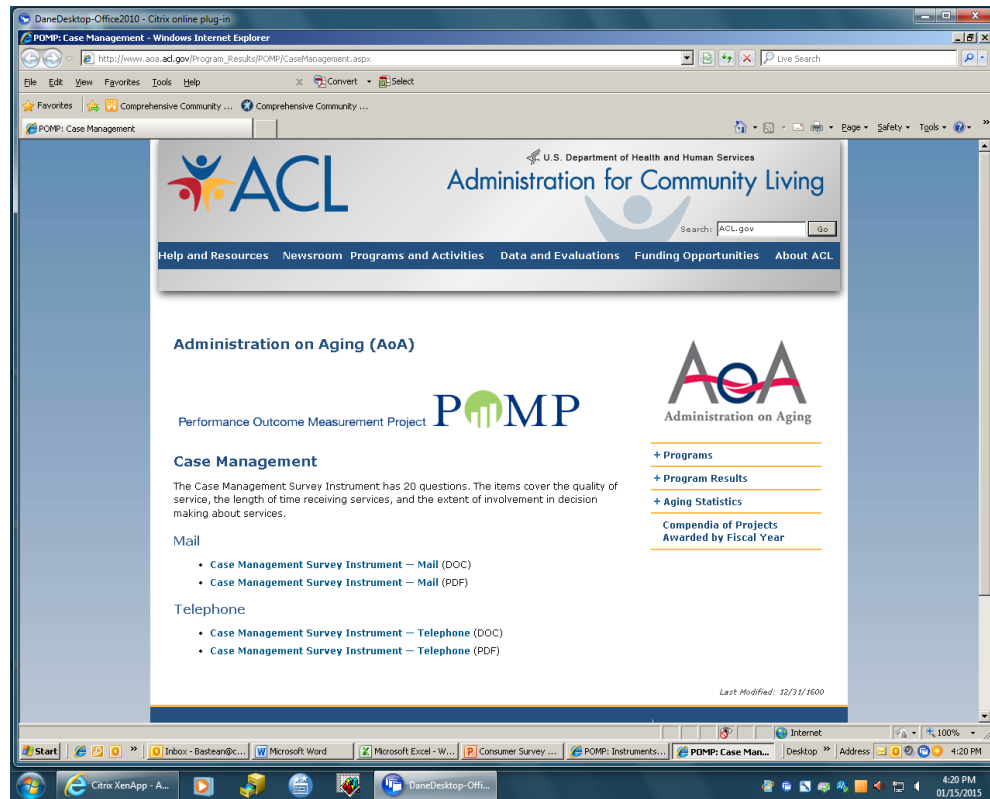


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DATA COLLECTION



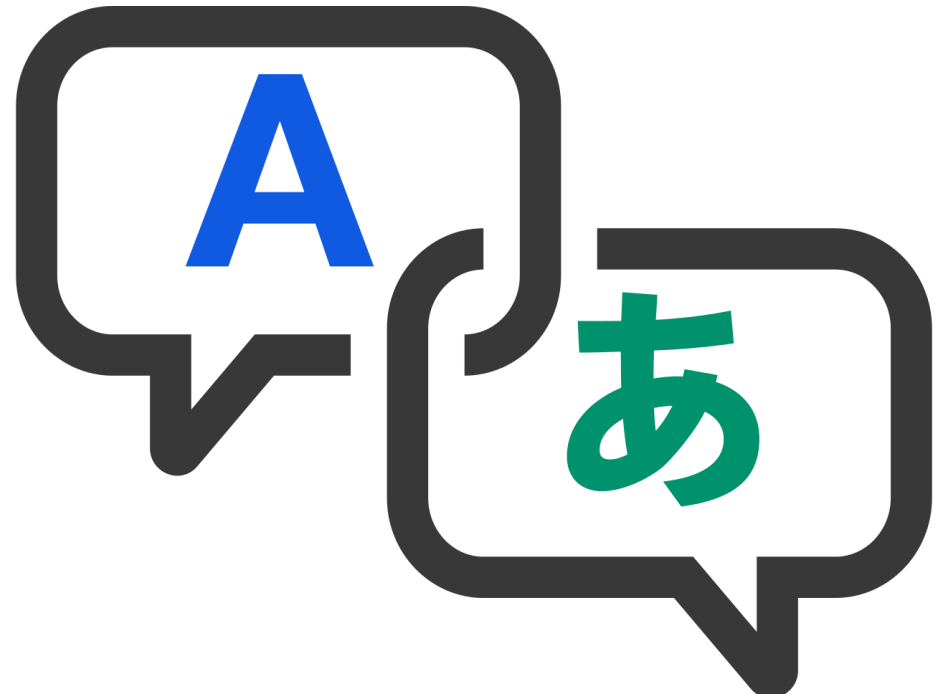
Survey Instrument



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TRANSLATION

- Survey was translated into Spanish.
- NESCO identified clients who were to receive the Spanish/English version of the survey.



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SURVEY POPULATION

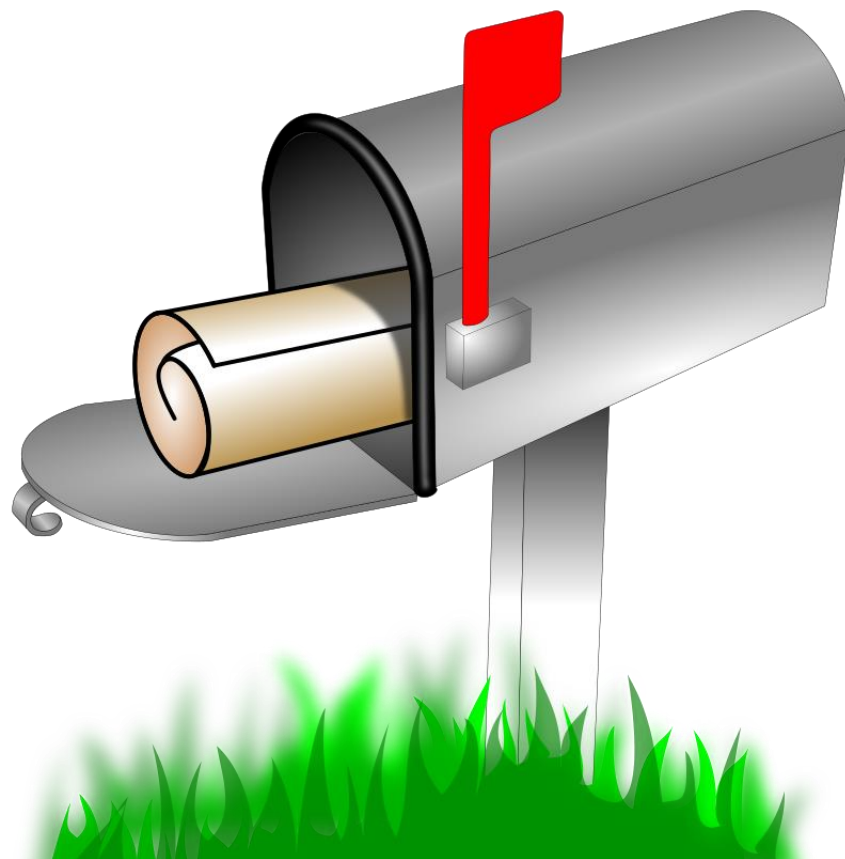
- Clients reported to the DCDHS Information System.
- Who received case management services between January 1 and August 31, 2016.
- Who were still living.
- Had a viable mailing address.
- Addresses were updated by focal points which also identified guardians as needed.
- Pulled random sample.



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SURVEY METHOD

- A total of 1,199 survey forms mailed October 13-17, 2016.
- Postage paid business reply envelope.
- Due date was November 7.
- Surveys with bad addresses and a forwarding address in Dane County were re-mailed until 2 weeks prior to due date.



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RESPONSE RATE

- 488 surveys returned.
- 24 excluded –no services received in 2016.
- 464 useable survey forms.
- 40.6% response rate overall.
- 29% response rate on English/Spanish forms.
- 20% is acceptable response rate for a one-time mail survey.



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SAMPLE FOR ANALYSIS

- Excluded those with no service in 2016 or only service was equipment loan or Medicare Part D (Drug) sign up.
- Sample of 314 forms pulled from remaining 402 forms using the RAND function in Excel based on percentage of clients served during study period by Agency.



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FINDINGS

DEMOGRAPHICS



RESPONDENTS IN SAMPLE COMPARED WITH CLIENTS SERVED

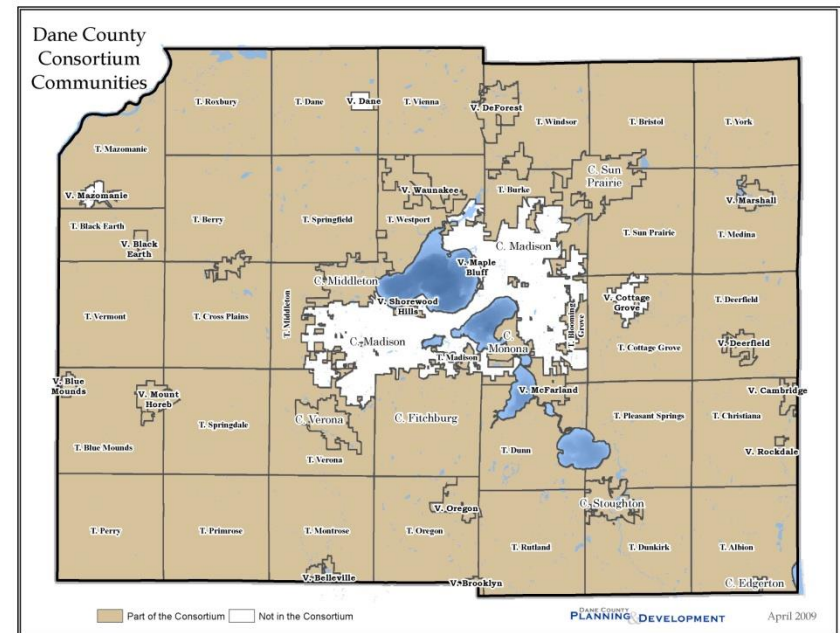
Respondents in the sample used for the overall program analysis were representative of clients served during the study period in terms of gender, race/ethnicity, generation, and average length of service.



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MUNICIPALITIES – NOT REPRESENTED

- City of Edgerton (portion of which is in Dane County.)
- Town of Christiana
- Town of York
- Village of Rockdale
- Village of Shorewood Hills



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FINDINGS

PARTICIPATION IN SERVICE PLANNING



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91% of respondents indicated their case manager involved them in discussing and planning services.

52% indicated their case manager developed a care plan.

Of those, 67% received a copy of the care plan.

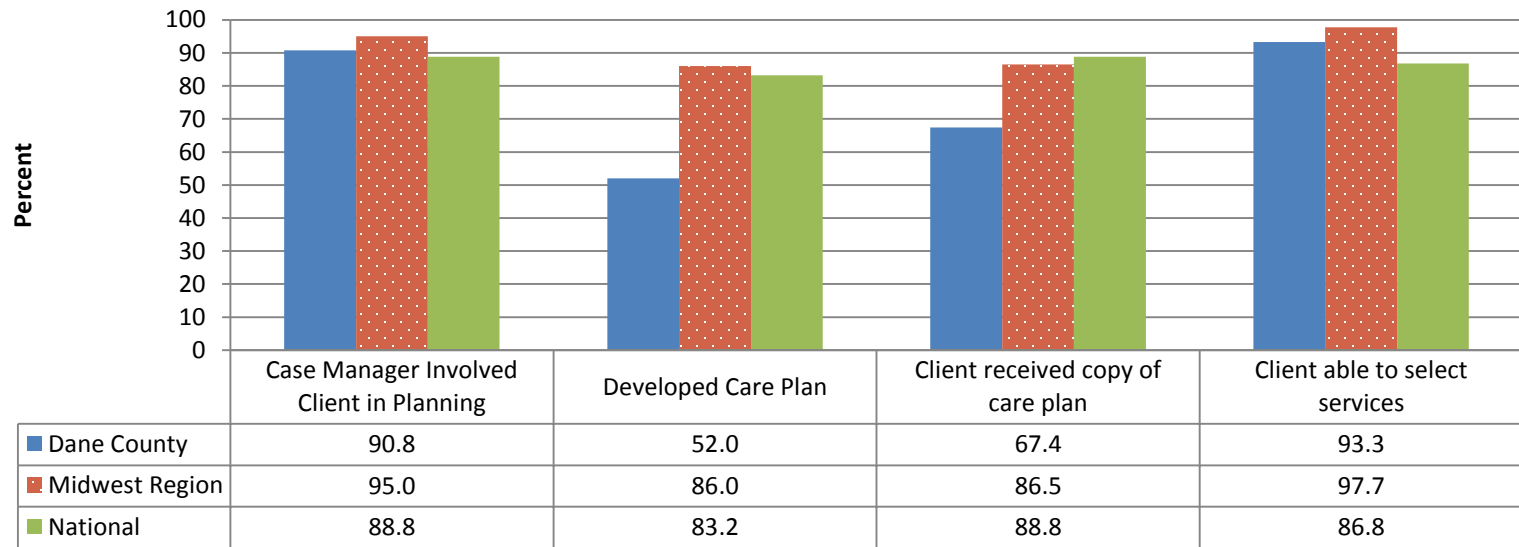
93% were able to select the services they received.



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PARTICIPATION IN SERVICE PLANNING

Percent of Respondents Indicating "Yes" to Items on Participation in Service Planning: Dane County Compared with 2015 Midwest Census Region and National Data



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FINDINGS

SERVICE QUALITY



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- 92% of case managers return phone calls promptly.
- 95% of case managers explain services in a way client can understand.



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SERVICE QUALITY



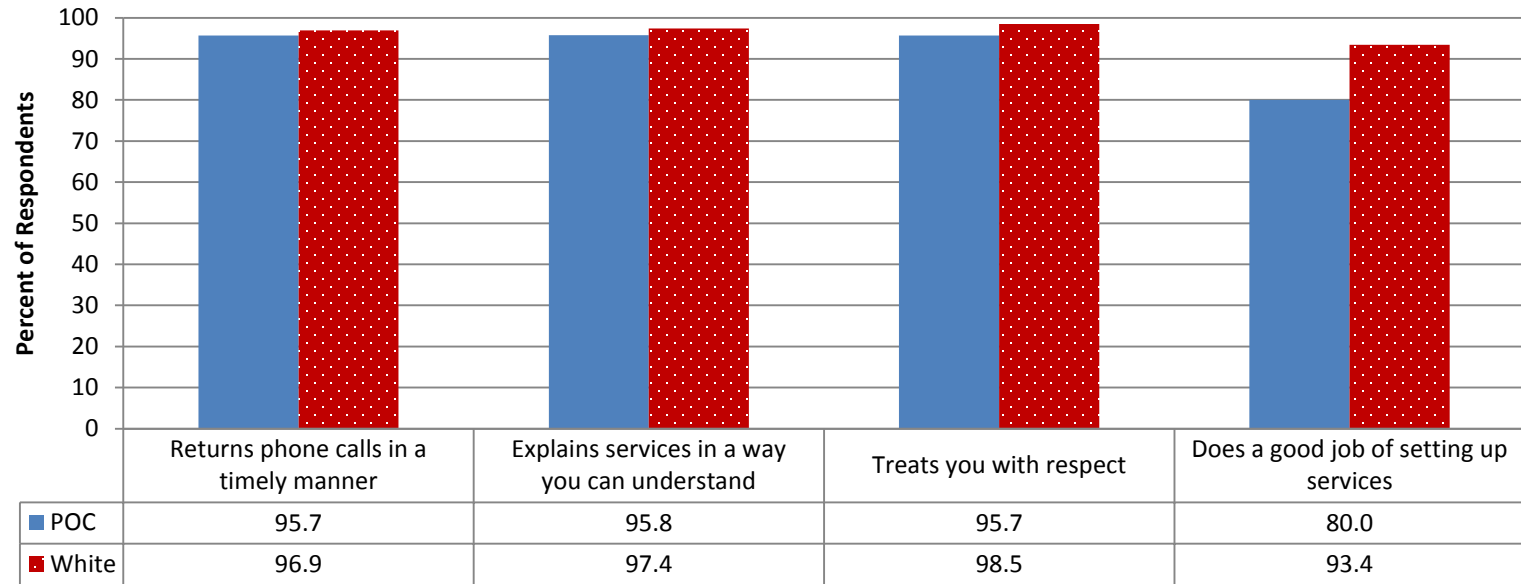
- 96% of respondents reported their case manager treats them with respect.
- 83% of respondents indicated their case manager does a good job setting up services.



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SERVICE QUALITY

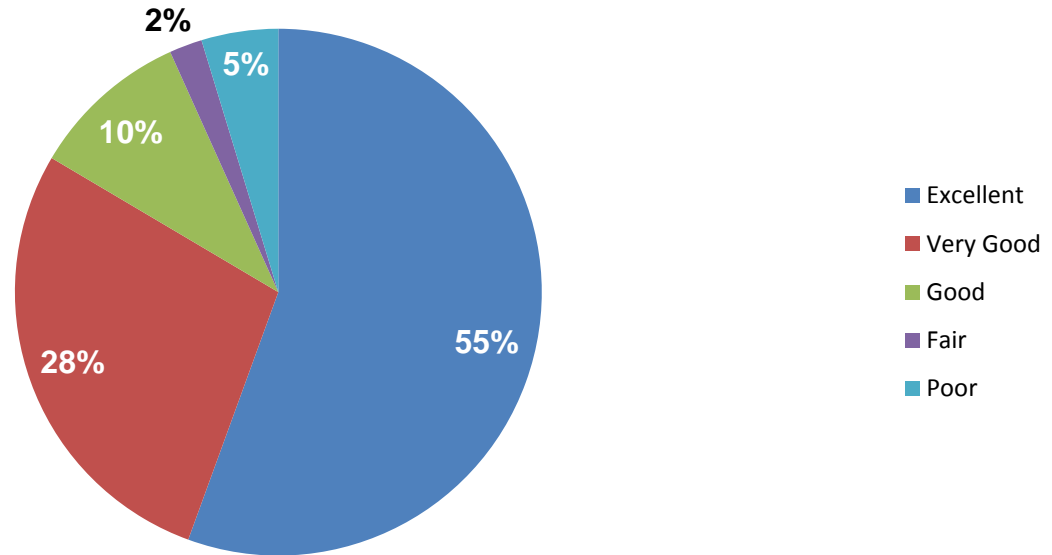
Percent of Respondents Indicating "Yes" to Items on Service Quality: Persons of Color Compared with Whites



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OVERALL QUALITY

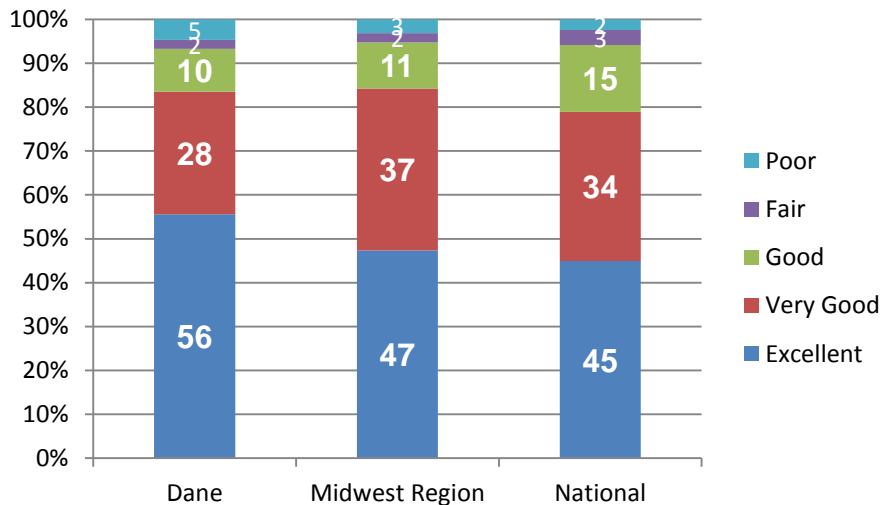
Overall Quality of Case Management Services



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OVERALL QUALITY

Respondent Rating of Overall Service Quality: Dane County Compared with 2015 Midwest Region and National Data



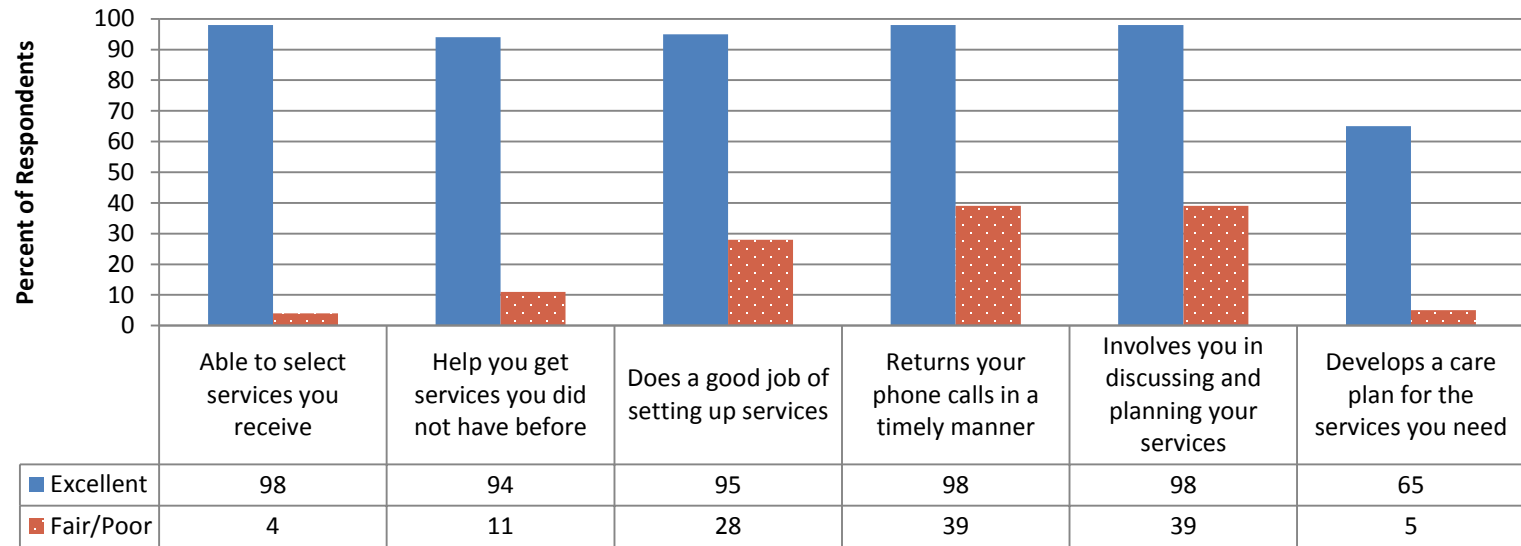
While 2016 Dane County sample survey respondents were more likely to rate case management services as “Excellent,” the percent of persons rating the services positively (excellent, very good, good) was virtually the same for Dane County at 94% as it was for the 2015 survey results for the Midwest Census Region at 95% and the National results at 94%.



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OVERALL QUALITY

Percent of Survey Respondents Rating the Overall Quality as "Excellent" Compared with Those Rating it "Fair" or "Poor" on Key Survey Items Rated Positively (Yes)



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FINDINGS

BENEFITS



BENEFITS

- 81% indicated case manager helped get services did not have before.
- 92% situation is better because of case manager's help.
- 88% indicated services helped them continue to live where they chose.



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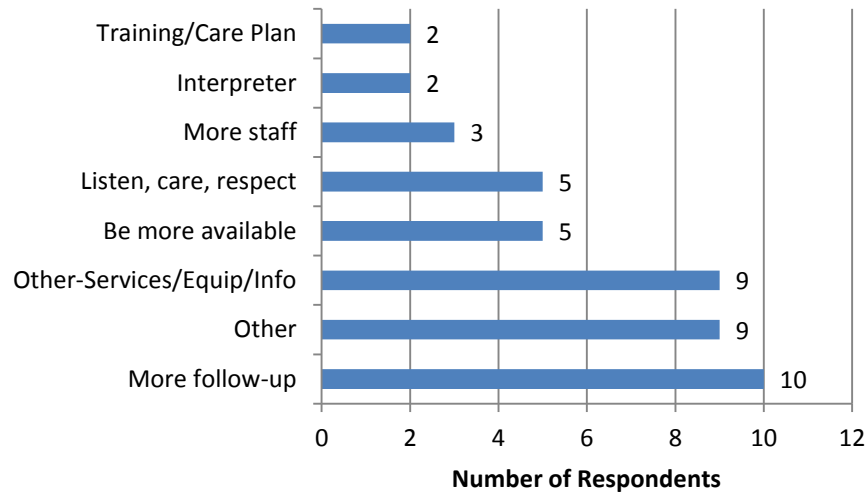


RECOMMENDATIONS



RECOMMENDATIONS

Responses to Question, "What recommendations do you have for improving the case management services?"

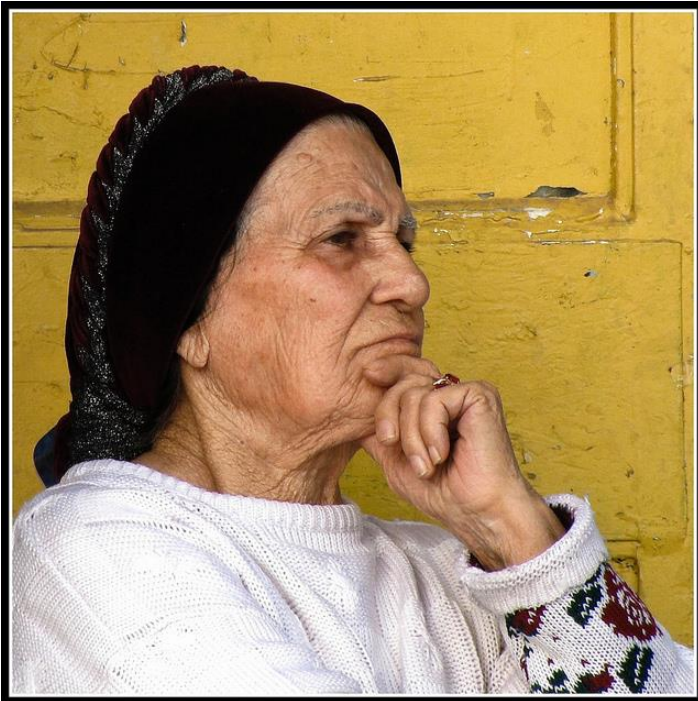


Of the 144 respondents to this question, 35% had none and another 34% had praise for the service and/or case manager. The graph shows the responses for the remaining 44 respondents.



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RECOMMENDATIONS



Other – Services/
Equipment/
Information: additional
services (6) such as
help with raking leaves,
legal help, physical
therapy, good reliable
housecleaning; more
information on other
services (2); or
equipment needs (1).



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RECOMMENDATIONS



Other: “I’d like brownies delivered.” – jokingly (1); comments about home-delivered meals (2); being own payee (1); less bureaucracy (1); make duplicate copy of calendar of events (1); add not applicable to more questions on survey (1); other personal comments.



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QUESTIONS



THANK YOU!

Web Site:

- <https://aaa.dcdhs.com/pdf/Consumer%20Survey%202016%20-%20AAA%20Case%20Management%20-%20Results.pdf>

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